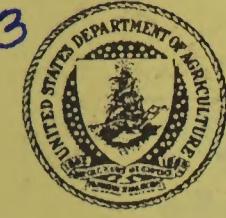


## **Historic, archived document**

Do not assume content reflects current scientific knowledge, policies, or practices.





United States  
Department of  
Agriculture  
Foreign  
Agricultural  
Service  
Circular Series  
WAP 7 - 89  
JULY 1989

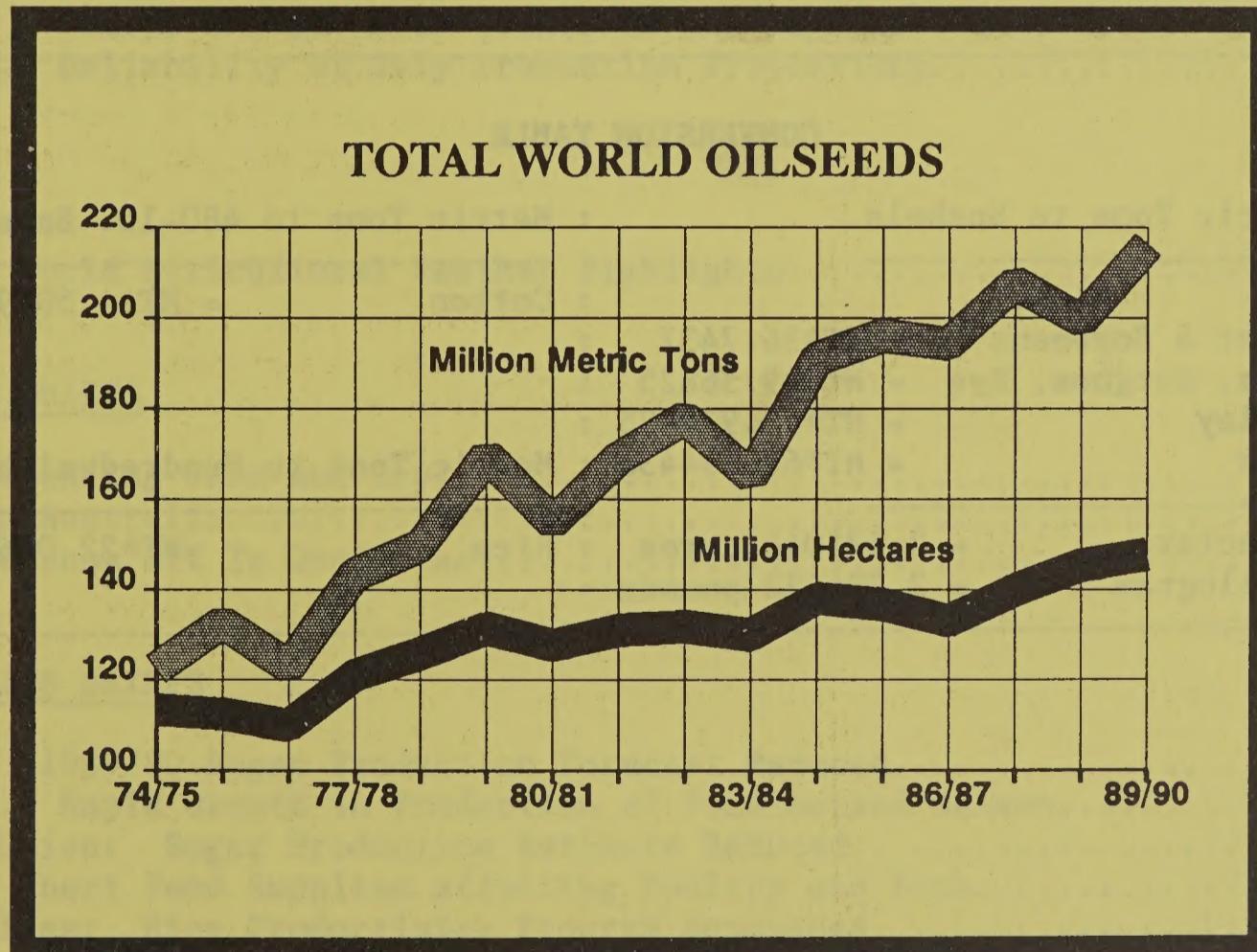
# World Agricultural Production

## Inside This Issue....

1989/90 Oilseeds Production Forecast  
EC-12 Oilseeds Situation and Production Outlook  
World Tobacco Production By Type  
Honduran Forest Products Situation

REFERENCE RECORDS  
AGRICULTURE  
SERIALS SEARCH

OCT 11 1989



This report draws on information from USDA's global network of agricultural attaches and counselors, official statistics of foreign governments, other foreign source materials, and results of office analysis. Estimates of U.S. acreage, yield, and production are from USDA's Agricultural Statistics Board, except where noted. All numbers in this report are based on unrounded data and detail may not add to totals because of rounding. This report reflects official USDA estimates released in World Agricultural Supply and Demand Estimates (WASDE-232), July 12, 1989.

This report was prepared by the Foreign Production Estimates Division (FPED), FAS/USDA, Washington, D.C. 20250. Further information may be obtained by writing to the division or by calling (202) 382-8888.

\*\*\*\*\*  
\* The next issue of World Agricultural Production will be released at 3 p.m. \*  
\* eastern time on August 11, 1989. \*  
\*  
\*\*\*\*\*

CONVERSION TABLE

: Metric Tons to Bushels	: Metric Tons to 480-lb. Bales
: -----	: -----
: Cotton	= MT*4.592917
: Wheat & Soybeans = MT*36.7437	:
: Corn, Sorghum, Rye = MT*39.36825	:
: Barley = MT*45.929625	:
: Oats = MT*68.894438	: Metric Tons to Hundredweight
: -----	: -----
: 1 hectare = 2.471044 acres	: Rice = MT*22.04622
: 1 kilogram = 2.204622 pounds	:

## TABLE OF CONTENTS

<u>SUBJECT</u>		<u>PAGE</u>
<u>PRODUCTION HIGHLIGHTS FOR 1989/90</u>		
Wheat.....		5
Coarse Grains.....		6
Rice.....		7
Oilseeds.....		8
Cotton.....		12

## TABLES

Table 1. U.S. Crop Acreage, Yield, and Production.....	14
Table 2. World Crop Production Summary.....	15
Table 3. Wheat Area, Yield, and Production: World and Selected Countries and Regions.....	16
Table 4. Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions.....	17
Table 5. Rice Area, Yield, and Production: World and Selected Countries and Regions.....	20
Table 6. Oilseeds Area, Yield, and Production: World and Selected Countries and Regions.....	21
Table 7. Cotton Area, Yield, and Production: World and Selected Countries and Regions.....	23
Table 8. Reliability of July Production Projections.....	24

## MAPS

Map 1. World Agricultural Weather Highlights.....	25
---	----

## WEATHER BRIEFS

Europe Trending Warm and Dry.....	26
Rainy in Australia.....	26
Asian Monsoon Off To Good Start.....	26

## PRODUCTION BRIEFS

Brazil: 1989/90 Sugar Production Forecast Reduced.....	27
Ireland: Rapid Growth in Production of Pond Raised Salmon.....	27
Soviet Union: Sugar Production Estimate Reduced.....	27
Kenya: Short Feed Supplies Affecting Poultry and Pork.....	27
Philippines: Rice Productivity Program Announced.....	28
China: Wheat Production Outlook Favorable.....	28
China: New Series Revisions.....	28
Australia: Honey Production Hurt by Wet Weather.....	28
Brazil: 1988/89 Orange Crop Up 5 percent.....	29
Cote D'Ivoire: Cocoa Production Revised Upward.....	29

## FEATURE COMMODITY ARTICLES

World Oilseed Production in 1989/90.....	30
EC-12 Oilseed Production Situation and Outlook.....	35
Forest Products Situation in Honduras.....	43
Rapid Growth in Korea's Dairy Sector.....	44
World Unmanufactured Tobacco Production by Type.....	46

## FEATURE TABLES

Table 9. Oilseeds Production.....	32
Table 10. Oilseeds Area.....	33
Table 11. 1989/90 Oilseeds Area & Production by Region.....	34
Table 12. EC-12 Rapeseed Area and Yield Comparison.....	36
Table 13. EC-12 Green Rates Versus Exchange Rates.....	38
Table 14. EC Oilseed Price Regimes.....	39
Table 15. EC-12 Oilseed Production forecasts for 1989/90.....	42
Table 16. Honduras: Land Use, Sawnwood Production and Plywood Production.....	43
Table 17. Korea: Milk Production, Cow Numbers, and Production of Dairy Feeds.....	45
Table 18. Korea: Development of the National Dairy Herd.....	45
Table 19. Total Unmanufactured Tobacco.....	47
Table 20. Flue Cured Tobacco.....	50
Table 21. Burley Tobacco.....	53
Table 22. Oriental Tobacco.....	56
Table 23. Dark air and Sun Cured Tobacco.....	57
Table 24. Light Air Cured Tobacco.....	59
Table 25. Dark Air Cured Tobacco, Cigar.....	60
Table 26. Dark Fire Cured Tobacco.....	61

## CHARTS

Chart 1. EC: Gross Returns for Competing Crops.....	40
---	----

## PRODUCTION HIGHLIGHTS FOR 1989/90

**WHEAT:** World production for 1989/90 is estimated at 533.4 million metric tons, up 2.3 million or less than 1 percent from last month and up 7 percent from last year's harvest. Important changes from last month include the following:

- o **United States** Production is estimated at 57.6 million tons, up 2.4 million or 4 percent from last month and up 17 percent from last year. The increase is attributed to higher estimated area.
- o **Turkey** Production is estimated at 12.0 million tons, down 1.0 million or 8 percent from last month and down 20 percent from last year's record harvest. The reduction is due to lower estimated area and yield.
- o **Australia** Production is estimated at 14.3 million tons, down 0.7 million or 5 percent from last month and down 1 percent from last year. Wet weather in the eastern wheat belt has limited farmers' ability to increase wheat area as much as previously expected.
- o **EC-12** Production is estimated at 77.6 million tons, down 0.3 million or less than 1 percent from last month, but up 4 percent from 1988. A drought-related reduction in West Germany more than offset an increase in the United Kingdom.
- o **Pakistan** Production is estimated at 14.3 million tons, down 0.3 million or 2 percent from last month, but up 13 percent from last year. Fertilizer usage for the wheat crop was less than expected, leading to lower estimated yield.
- o **East Europe** Production is estimated at 41.1 million tons, up 1.3 million or 3 percent from last month, but down 9 percent from last year's crop. June rainfall in Yugoslavia and Romania has boosted yield prospects and more than offset a reduction in the German Democratic Republic.
- o **South Africa** Production is estimated at 3.3 million tons, up 0.5 million or 16 percent from last month, but down 6 percent from last year's revised record crop. Recent rains, even in the summer rainfed area, have raised the yield estimate.
- o **Argentina** Production is estimated at 10.5 million tons, up 0.5 million or 5 percent from last month and up 35 percent from last year. Planted area is expected to increase due to favorable weather and increased production incentives.

**COARSE GRAINS:** World production for 1989/90 is estimated at 809.4 million tons, down 14.1 million or 2 percent from last month, but up 11 percent from last year. Important changes from last month include the following:

- o United States Production is estimated at 222.1 million tons, down 11.5 million or 5 percent from last month, but up 48 percent from last year. The reduction is due mainly to lower estimated corn production.
- o EC-12 Production is estimated at 80.7 million tons, down 2.1 million or 2 percent from last month and down 9 percent from 1988. Late spring and early summer hot, dry conditions across much of northern Europe has reduced estimated barley yields in the United Kingdom, France, West Germany, and Denmark. Hot, dry weather in central France has negatively affected the estimated corn yield.
- o Other W. Europe Production is estimated at 11.5 million tons, down 0.6 million or 5 percent from last month, but up 3 percent from last year. Yield estimates for all major coarse grains were reduced for Sweden and Finland due to drought.
- o China Production is estimated at 95.7 million tons, down 0.5 million or 1 percent from last month, but up 2 percent from last year's revised output. The estimate for corn is estimated down by 0.5 million tons from last month due to a downward revision in area.
- o Australia Production is estimated at 7.2 million tons, up 0.3 million or 5 percent from last month and up 6 percent from 1988. Barley harvested area and oat yield are estimated higher.
- o Canada Production is estimated at 23.3 million tons, up 0.3 million or 1 percent from last month and up 19 percent from last year. The increase is due to higher estimated area for corn and oats.
- o East Europe Production is estimated at 69.0 million tons, up 0.3 million or less than 1 percent from last month and up 13 percent from last year's drought-affected harvest. Recent rains have improved the yield estimate for corn in Yugoslavia, which more than offsets reductions for East German oats, rye, and barley.

**RICE (MILLED-BASIS):** World production for 1989/90 is estimated at a record 328.2 million tons, up 3.9 million or 1 percent from the 1988/89 crop. Foreign production in 1989/90 is projected at a record 323.4 million tons, an increase of 4.1 million or 1 percent from 1988/89. U.S. output is projected at 4.9 million tons, down 0.2 million or 4 percent from last season. Significant changes from last year include the following:

o China

Production is estimated at 122.5 million tons, up 2.8 million or 2 percent from last year. The increase is due to slightly higher estimated area and more normal yields following last year's weather-reduced output.

o India

Production is estimated at 65.0 million tons, down 1.0 million or 2 percent from last year's record crop. The decrease is attributed to the return of a more normal monsoon season, following an extremely favorable 1988 monsoon.

o Thailand

Production is estimated at 13.7 million tons, up marginally from last year. Normal yields are forecast, and area is expected to remain virtually unchanged.

o Indonesia

Production is estimated at 28.0 million tons, up 0.5 million or 2 percent from last year. Favorable weather and prices are expected to stimulate rice production this year. The main season crop, harvested in March/April had abundant irrigation water and excellent estimated yields. Input supplies are judged adequate for the dry season crop planted last month.

o Bangladesh

Production is estimated at 15.7 million tons, up 0.3 million or 2 percent from last year. Rice area is estimated at a more normal level following last year's floods, which reduced area to the lowest level in 25 years.

o Pakistan

Production is estimated at 3.5 million tons, up 0.4 million or 13 percent from last year's flood-affected crop. Increased production is expected from improved yields and higher price incentives relative to other crops.

o Burma

Production is estimated at 7.2 million tons, down 0.1 million or 2 percent from last year. Area is expected to remain unchanged.

o Philippines

Production is estimated at 6.0 million tons, up 0.2 million or 3 percent from last year. Continued growth in both area and yield is forecast.

**OILSEEDS:** World production for 1989/90 is forecast at 215.4 million tons, up 16.3 million tons or 8 percent from last year's output. U.S. production is estimated at 60.7 million tons, up 10.6 million or 21 percent from last year. Foreign production is estimated at a record 154.7 million, up 5.6 million or 4 percent from last year's output.

\* **Soybeans:** World production for 1989/90 is forecast at 109.1 million tons, up 15.6 million or 17 percent from last year. Significant changes from last year include:

o United States

Production is estimated at 53.1 million tons, up 11.2 million or 27 percent from last year. A 5-percent increase in area over last year combined with a return to near trend yields is expected to boost output to the fifth highest level on record.

o Argentina

Production is forecast at a record 10.5 million tons, up 3.9 million or 59 percent from 1988/89. Area is forecast up 1.0 million hectares and yield is expected to rebound from last year's low level.

o Brazil

Production is forecast at 21.0 million tons, down 1.0 million or 4.5 percent from last year's record crop. The estimate is based on an anticipated marginal expansion in area and average yields.

o China

Production is estimated at 12.0 million tons, up 0.4 million or 3 percent from last year. The increase is based on an estimated 3-percent rise in planted area.

o East Europe

Production is estimated at 0.8 million tons, up 0.2 million or 24 percent from last year. Production is forecast to rebound based on slightly higher area and average yields.

o India

Production is estimated at 1.3 million tons, down 0.1 million or 7 percent from last year's record crop. Area is forecast to decline slightly from the 1988/89 record level.

o Indonesia

Production is estimated at 1.3 million tons, up 0.2 million or 14 percent from last year. Area is forecast to increase in response to high domestic prices.

o Mexico

Production is estimated at 0.7 million tons, up 0.4 million or 133 percent from last year's crop. Increased production should result from a combination of average yields and a return to more normal harvested area.

o Paraguay

Production is estimated at 1.4 million tons, up 0.2 million or 17 percent from 1988/89. The rise in production reflects continued increases in area and yield.

\* **Cottonseed:** World production for 1989/90 is forecast at 31.1 million tons, down 1.2 million or 4 percent from last year. Significant changes from last year include:

o United States

Production is estimated at 4.4 million tons, down 1.1 million or 19 percent from last year. While yields are expected to show improvement over last year's drought-affected crop, the decline is primarily a result of a reduction in area.

o China

Production is estimated at 7.4 million tons, up 0.3 million or 4 percent from last year. While area is estimated down 5 percent, planting conditions were good and yields are expected to be higher than last year.

o India

Production is estimated at 3.7 million tons, up 0.1 million or 3 percent from last year's flood-affected crop. Area is forecast to rise due to increased government incentives.

o Pakistan

Production is estimated at 3.0 million tons, up 0.1 million or 3 percent from last year's flood-affected crop. Area is forecast to rise slightly on improved prices and increased domestic demand.

o USSR

Production is estimated at 4.6 million tons, down 0.4 million or 9 percent from last year. Area is forecast down by 0.2 million hectares.

\* **Peanuts:** World production for 1989/90 is forecast at 22.4 million tons, up 0.4 million or 2 percent from last year. Significant changes from last year include:

o United States

Production is estimated at 2 million tons, up 0.2 million or 13 percent over last year. Area is forecast up slightly from last year while yields recover based on favorable planting and growing conditions.

o China

Production is estimated at 6.2 million tons, up 0.4 million or 7 percent from last year. Larger planted area and generally good weather this spring should bring production back to the 1987 level.

o India

Production is estimated at 7.0 million tons, down 0.5 million or 7 percent from last year's record crop. Area is forecast to decline slightly, owing to lower oilseed market prices following the 1988/89 record kharif and rabi crops.

o Senegal

Production is estimated at 0.8 million tons, up 0.1 million or 18 percent from last year. While area is estimated to decline slightly, yields are forecast to return to normal.

\* **Sunflowerseed:** World production for 1989/90 is forecast at 21.5 million tons, up 1.1 million or 6 percent from last year. Significant changes from last year include:

o United States

Production is estimated at 1.1 million tons, up 0.2 million or 24 percent from last year. Area is expected to decline by 11 percent from last year, while yields are forecast to rebound sharply.

o Argentina

Production is estimated at 3.5 million tons, up 0.6 million or 21 percent from last year. Area is forecast to increase 20 percent.

o EC-12

Production is estimated at 3.4 million tons, down 0.4 million or 11 percent from last year. Area is expected to remain essentially unchanged, but yields are forecast to be lower than the records set in the two previous years.

o East Europe

Production is estimated at 2.4 million tons, up 0.3 million from last year or 13 percent. Area is estimated to increase marginally and yields are forecast to improve over last year.

o USSR

Production is forecast at 6.3 million tons, up 0.1 million or 2 percent from last year. The forecast is based on average yields and a slight increase in area.

\* **Rapeseed:** World production for 1989/90 is estimated at 21.4 million tons, down 0.5 million or 2 percent from last year. Significant changes from last year include:

o Canada

Production is estimated at 3.7 million tons, down 0.5 million or 13 percent from last year. The estimate is based on average yields and Statistics Canada's June planting report which indicates lower area.

o China

Production is estimated at 5.7 million tons, up 0.7 million or 13 percent from last year. Growing conditions were generally good for the rapeseed crop and production is expected to be much better than in 1988, when the crop was hurt by severe weather.

o EC-12

Production is estimated at 4.5 million tons, down 0.6 million or 12 percent from last year. Poor 1988/89 yields in France and the United Kingdom decreased grower interest in rapeseed and dry fall and winter weather in France reduced plantings and hindered germination.

o India

Production is estimated at 3.3 million tons, down 0.4 million or 11 percent from last year's record crop. Area is forecast to decline slightly, while yields are forecast at near average levels.

o East Europe

Production is estimated at 2.4 million tons, up 0.2 million or 8 percent from last year. Area is expected to increase by 9 percent over last year.

\* **Flaxseed:** World production for 1989/90 is estimated at 2.1 million tons, up 0.4 million tons or 26 percent from last year. Significant changes from last year include:

o Canada

Production is estimated at 0.8 million tons, up 0.3 million or 81 percent from last year. The estimate is based on Statistics Canada's June planting report showing higher area and a return to normal yields after last year's drought.

\* **Copra:** World production for 1989/90 is estimated at 4.7 million tons, up 0.2 million tons or 4 percent from last year. Significant changes from last year include:

o Philippines

Production is estimated at 2.0 million tons, up 0.2 million or 8 percent from last year. Yields are expected to rebound following typhoon damage in late 1988 and two consecutive dry growing seasons.

\* **Palm Kernels:** World production for 1989/90 is forecast at 3.1 million tons, up 0.2 million or 7 percent from last year. Significant changes include:

o Malaysia

Production is estimated at 1.7 million tons, up 0.1 million or 8 percent from last year. The increase is due to continued area expansion of palm and favorable weather during the past year.

\* **Palm Oil:** World production for 1989/90 is forecast at 9.8 million tons, up 0.7 million or 8 percent from last year. Significant changes from last year include:

o Malaysia

Production is estimated at 5.9 million tons, up 0.4 million or 8 percent from last year. The increase is attributed to a continued growth in area and to favorable yields resulting from good weather conditions and increased fertilizer usage.

o Indonesia

Production is estimated at 1.7 million tons, up 0.2 million or 10 percent from last year. Harvested area is expected to increase significantly as trees planted 3-5 years ago start to produce.

**COTTON:** World production for 1989/90 is estimated at 80.8 million bales, down 1.7 million or 2 percent from last month and down 3.2 million or 4 percent from 1988/89. Foreign production is estimated at 68.8 million bales, down 0.2 million or less than 1 percent from last month, but up 0.2 million from 1988/89. Significant changes include:

o United States

Production is estimated at 12.0 million bales, down 1.5 million or 11 percent from last month and down 3.4 million or 22 percent from last year. The reduction from last month resulted from poor planting weather in Texas and the delta states.

o China

Production is estimated at 20.0 million bales, up 0.9 million or 5 percent from last year. Although area is expected to be down 4 percent planting weather was favorable and yields are expected to rebound from last year's depressed level.

o USSR

Production is estimated at 11.5 million bales, down 1.1 million or 9 percent from 1988/89. Planted area is down and cold spring weather damaged a substantial area, requiring replanting after the optimal period.

o Turkey

Production is estimated at 2.9 million bales, down 0.1 million or 5 percent from last year. Planted area declined by 32,000 hectares as farmers switched to more profitable crops.

o India

Production is estimated at 8.4 million bales, up 0.2 million or 2 percent from last year's flood-damaged crop. Area is expected to rise significantly owing to favorable prices.

o Pakistan

Production is estimated at 6.8 million bales, up 0.2 million or 2 percent from last year's record crop. Strong demand and high prices are expected to lure farmers in Sind Province away from sugarcane this year, boosting the chance for another record crop.

o Australia

Production is estimated at 1.4 million bales, up 0.2 million or 13 percent from last year. Area is forecast to rise 20 percent over last year due to excellent soil moisture conditions, good irrigation supplies, and a favorable outlook for world cotton prices.

o Brazil

Production is estimated at 3.5 million bales, up 0.2 million or 6 percent from last year. Area is expected to expand in response to strong domestic demand and higher prices.

o Mexico

Production is estimated at 0.9 million bales, down 0.5 million or 38 percent from last year. The decrease in production is due to reduced plantings, as growers responded to low cotton prices and high input costs.

o Egypt

Production is estimated at 1.6 million bales, up 0.2 million or 14 percent from last year. Increased production is anticipated as farmers boosted plantings in response to government production incentives.

Table 1  
*U.S. Crop Acreage, Yield, and Production 1/*

Commodity	--Planted Area--				--Harvested Area--				--Yield--				--Production--			
	1987/88		1988/89		1989/90		1988/89	1987/88	1988/89	1987/88	1988/89	1987/88				
	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.	Prel.	Proj.
--Million Acres--																
All Wheat	65.8	65.5	76.8	56.0	53.2	63.5	37.7	34.1	33.4	2107	1811	2028	2117			
Winter	48.8	48.8	55.2	39.3	39.8	42.5	39.8	39.2	34.5	1565	1561	1408	1462			
Other	17.0	16.7	21.5	16.6	13.4	21.0	32.6	18.7	31.2	542	250	620	655			
Rye	2.5	2.4	2.1	0.7	0.6	0.5	28.3	24.8		20	15	20	15			
Soybeans	58.0	58.9	61.3	57.0	57.4	60.2	33.7	26.8		1923	1539	1950	1950			
Corn	65.7	67.6	72.8	59.2	58.2	65.8	119.4	84.6		7072	4921	7850	7450			
Sorghum	11.8	10.4	11.9	10.6	9.1	10.6	69.7	63.8		739	578	700	675			
Barley	11.0	9.7	9.3	10.1	7.5	8.7	52.7	38.6		51.3	530	291	450	445		
Oats	18.0	13.9	12.1	6.9	5.6	7.4	54.0	39.1		52.6	374	219	420	388		
--Pounds per Acre--																
Rice	2.4	2.9	2.8	2.3	2.9	2.7	5.555	5.511					129.6	159.5	159.0	153.0
All Cotton	10.4	12.5	10.5	10.0	11.9					706	619					
--Million CWT.---																
--Million 480-Pound---																

1/ Estimates from USDA Agricultural Statistics Board for 1987/88, 1988/89, and for 1989/90 planted and harvested area.  
1989/90 production and yield estimates for wheat, barley, and oats are also from USDA Agricultural Statistics Board.  
All other 1989/90 estimates are from USDA Interagency Commodity Estimates Committees.

JULY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

TABLE 2

## World Crop Production Summary

Commodity	World	Total Foreign	North America		Europe		USSR	Asia				South America		Selected Other		All Other Countries				
			United States	Canada	Mexico	EC-12	Orth. W. Europe	Eastern Europe	China	India	Indonesia	Pakistan	Thailand	Argentina	Australia	South Africa				
—Million Metric Tons—																				
Wheat	501.8	444.4	57.4	26.0	3.7	71.4	4.0	39.8	83.3	85.8	44.3	0.0	12.0	0.0	8.8	6.1	12.4	3.1	13.0	16.1
1987/88	500.2	450.9	49.3	15.7	3.2	74.7	3.9	45.1	84.4	86.4	45.1	0.0	12.7	0.0	7.8	5.8	14.5	3.5	15.0	17.0
1988/89 prel.																				
1989/90 proj.																				
June	531.1	475.9	55.2	26.0	3.9	77.8	4.2	39.9	91.5	91.0	50.0	0.0	14.6	0.0	10.0	4.5	15.0	2.9	13.0	16.1
July	533.4	475.7	57.6	26.0	3.9	77.6	4.1	41.1	91.5	91.0	50.0	0.0	14.3	0.0	10.5	4.5	14.3	3.3	12.0	16.0
Coarse Grains	792.1	576.2	215.9	25.5	14.5	82.4	10.9	84.6	113.7	95.8	23.5	4.8	1.7	3.0	13.1	25.4	6.8	7.9	9.3	62.4
1987/88	728.2	578.6	149.6	19.6	14.3	88.7	11.2	60.8	97.5	94.2	32.6	5.0	1.7	4.6	6.7	26.7	6.7	11.7	10.0	73.9
1988/89 prel.																				
1989/90 proj.																				
June	823.5	589.9	233.6	23.0	15.0	82.8	12.1	68.7	105.5	98.2	31.7	5.0	1.8	4.8	12.5	24.8	6.8	8.8	9.1	68.4
July	809.4	587.3	222.1	23.3	15.0	80.7	11.5	69.0	105.5	95.7	31.7	5.0	1.8	4.8	12.5	24.8	7.2	8.8	9.1	68.0
Rice (Milled)	312.6	308.5	4.1	0.0	0.4	1.3	0.0	0.2	1.7	122.1	56.4	27.0	3.2	11.7	0.2	8.0	0.5	0.0	0.2	21.9
1987/88	324.4	319.3	5.1	0.0	0.3	1.3	0.0	0.2	1.9	119.7	66.0	27.5	3.1	13.7	0.2	7.2	0.6	0.0	0.2	22.1
1988/89																				
1989/90																				
June	325.0	320.0	5.0	0.0	0.4	1.2	0.0	0.2	1.8	122.5	65.0	28.0	3.5	13.7	0.3	7.2	0.5	0.0	0.2	22.7
July	328.2	323.4	4.9	0.0	0.4	1.2	0.0	0.2	1.8	122.5	65.0	28.0	3.5	13.7	0.3	7.2	0.5	0.0	0.2	22.7
Total Grains 1/	1,808.4	1,329.1	277.3	51.5	18.6	155.1	14.9	104.6	198.7	303.7	124.2	31.8	16.9	14.7	22.1	39.5	19.8	11.0	22.4	179.4
1987/88	1,552.8	1,348.9	203.9	35.3	17.8	164.7	15.1	106.2	183.8	300.2	143.7	32.5	17.5	18.3	14.7	39.7	21.7	15.2	25.2	197.4
1988/89 prel.																				
1989/90 proj.																				
June	1,679.6	1,385.8	293.8	49.3	19.3	159.6	15.6	110.4	198.8	309.2	146.7	33.0	19.6	18.6	23.3	36.5	22.0	12.1	21.2	191.4
July	1,671.0	1,386.4	284.6	49.3	19.3	159.6	15.6	110.4	198.8	309.2	146.7	33.0	19.6	18.6	23.3	36.5	22.0	12.1	21.2	191.4
Oilseeds 2/	208.0	147.4	60.6	5.9	1.2	12.2	0.5	5.3	11.8	33.7	13.6	1.7	3.2	0.5	14.0	19.7	0.8	1.0	2.0	20.3
1987/88	199.1	149.0	50.1	5.9	0.9	11.3	0.6	5.1	12.7	30.9	17.1	1.9	3.3	0.7	10.6	23.5	0.8	0.9	2.3	20.9
1988/89 prel.																				
1989/90 proj.																				
June	215.0	153.5	61.5	5.8	1.1	10.3	0.7	5.7	12.5	32.7	16.2	2.1	3.4	0.7	15.2	22.5	0.9	0.9	2.4	21.7
July	215.4	154.7	60.7	5.8	1.1	10.3	0.7	5.7	12.5	32.7	16.2	2.1	3.4	0.7	15.2	22.5	0.9	0.9	2.4	21.7
Cotton																				
1987/88	80.8	66.1	14.8	0.0	1.0	1.2	0.0	0.1	11.3	19.5	7.1	0.0	6.8	0.1	1.3	3.5	1.3	0.4	2.5	10.1
1988/89 prel.	84.0	68.6	15.4	0.0	1.4	1.6	0.0	0.1	12.6	19.1	8.2	0.0	6.6	0.1	0.8	3.3	1.2	0.3	3.0	10.2
1989/90 proj.																				
June	82.5	69.0	13.5	0.0	0.9	1.8	0.0	0.1	11.5	20.0	8.4	0.0	6.8	0.1	0.9	3.5	1.4	0.4	2.9	10.5
July	80.8	68.8	12.0	0.0	0.9	1.8	0.0	0.1	11.5	20.0	8.4	0.0	6.8	0.1	0.9	3.5	1.4	0.4	2.9	10.5

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 211.4 million tons in 1987/88, 195.1 million in 1988/89, and 210.0 million forecast in 1989/90.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also include copra and palm kernels for all countries.

JULY 1989

TABLE 3

## Wheat Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---			---Production---		
	Prel.	Proj.		Prel.	1989/90	Proj.	Prel.	1989/90	Proj.
	1987/88	1988/89	1989/90	1987/88	1988/89	June	1987/88	1988/89	June
	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
World	219.9	217.9	227.5	2.28	2.30	2.34	501.8	500.2	531.1
United States	22.6	21.5	25.7	2.53	2.29	2.24	57.4	49.3	55.2
Total Foreign	197.3	196.3	201.8	2.25	2.30	2.35	2.36	444.4	450.9
Maj. Foreign Exporters	43.3	41.8	44.8	2.74	2.69	2.83	2.87	118.6	112.6
Argentina	4.8	4.5	5.5	1.84	1.75	1.85	1.91	8.8	7.8
Australia	9.1	8.9	9.5	1.37	1.62	1.47	1.51	12.4	14.5
Canada	13.5	12.9	13.5	1.93	1.21	1.90	1.93	26.0	15.7
EC-12	15.9	15.5	16.3	4.50	4.81	4.81	4.76	71.4	74.7
Major Importers	95.4	96.3	97.8	2.34	2.40	2.42	2.43	223.5	231.1
Brazil	3.5	3.5	2.8	1.77	1.68	1.61	1.61	6.1	5.8
China	28.8	28.8	29.8	2.98	3.00	3.07	3.05	85.8	86.4
Eastern Europe	10.6	10.6	10.6	3.77	4.24	3.80	3.88	39.8	45.1
Egypt	0.6	0.6	0.6	4.23	4.76	4.76	4.76	2.4	2.8
Other N. Africa */	5.1	4.4	4.7	1.01	1.25	1.14	1.14	5.2	5.5
Japan	0.3	0.3	0.3	3.19	3.62	3.30	3.30	0.9	1.0
USSR	46.7	48.1	49.0	1.78	1.76	1.87	1.87	83.3	84.4
Other Foreign	58.6	58.3	59.2	1.75	1.84	1.87	1.86	102.3	107.2
India	23.1	22.6	23.3	1.92	2.00	2.15	2.15	44.3	45.1
Iran	6.1	6.3	6.3	0.98	1.08	1.00	1.00	6.0	6.8
Mexico	0.9	0.8	1.0	4.11	4.00	4.11	4.11	3.7	3.2
Non-EC W. Europe	0.9	0.8	0.9	4.20	4.90	4.74	4.66	4.0	3.9
Pakistan	7.7	7.3	7.6	1.56	1.73	1.95	1.89	12.0	12.7
South Africa	1.7	2.0	2.0	1.81	1.76	1.51	1.69	3.1	3.5
Turkey	8.7	8.8	8.7	1.49	1.71	1.48	1.38	13.0	15.0
Others	9.3	9.7	9.6	1.72	1.75	1.67	1.68	16.1	17.0

\*/ Algeria, Libya, Morocco, and Tunisia.

JULY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

TABLE 4  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel. Proj.			1989/90 Proj.				1989/90 Proj.			
	1987/88	1988/89	1989/90	1987/88	1988/89	June	July	1987/88	1988/89	June	July
<b>TOTAL COARSE GRAINS 1/</b>	<b>---Million Hectares---</b>			<b>---Metric Tons Per Hectare---</b>				<b>---Million Metric Tons---</b>			
World	323.6	327.2		2.45	2.23			792.1	728.2	823.5	809.4
United States	35.4	32.8		6.10	4.57			215.9	149.6	233.6	222.1
Total Foreign	288.2	294.4	291.7	2.00	1.97	2.02	2.01	576.2	578.6	589.9	587.3
Maj. Foreign Exporters	23.4	21.2	23.2	2.40	2.32	2.44	2.44	56.3	49.3	56.0	56.6
Argentina	4.4	3.0	4.2	2.99	2.22	2.98	2.98	13.1	6.7	12.5	12.5
Australia	4.6	4.6	4.7	1.49	1.46	1.51	1.54	6.8	6.7	6.8	7.2
Canada	8.0	7.2	7.9	3.21	2.73	2.96	2.97	25.5	19.6	23.0	23.3
South Africa	4.6	4.6	4.6	1.73	2.53	1.89	1.89	7.9	11.7	8.8	8.8
Thailand	2.0	1.8	1.8	1.51	2.54	2.65	2.65	3.0	4.6	4.8	4.8
Major Importers	108.0	106.7	105.5	2.66	2.57	2.71	2.69	287.6	274.1	285.6	283.3
Eastern Europe	18.1	18.3	18.2	3.56	3.33	3.76	3.79	64.6	60.8	68.7	69.0
EC-12	19.0	19.3	18.7	4.33	4.61	4.44	4.33	82.4	88.7	82.8	80.7
Other W. Europe	3.1	3.2	3.2	3.48	3.46	3.76	3.59	10.9	11.2	12.1	11.5
Mexico	7.8	7.6	7.9	1.87	1.88	1.90	1.90	14.5	14.3	15.0	15.0
USSR	59.5	57.8	57.0	1.91	1.69	1.85	1.85	113.7	97.5	105.5	105.5
Other Major Import. 2/	0.5	0.5	0.5	3.14	3.47	3.11	3.11	1.5	1.6	1.5	1.5
Other Foreign	156.7	166.5	163.1	1.48	1.53	1.52	1.52	232.3	255.2	248.4	247.4
Brazil	13.6	14.0	13.5	1.87	1.91	1.84	1.84	25.4	26.7	24.8	24.8
China	28.7	27.8	28.4	3.33	3.39	3.36	3.36	95.8	94.2	96.2	95.7
India	36.3	39.7	39.1	0.65	0.82	0.81	0.81	23.5	32.6	31.7	31.7
Indonesia	2.7	2.6	2.6	1.79	1.92	1.92	1.92	4.8	5.0	5.0	5.0
Nigeria	9.4	10.1	10.2	0.72	0.84	0.85	0.85	6.8	8.5	8.7	8.7
Philippines	3.8	3.8	3.8	1.15	1.16	1.18	1.18	4.3	4.4	4.5	4.5
Turkey	4.3	4.4	4.4	2.17	2.29	2.08	2.08	9.3	10.0	9.1	9.1
Others	58.0	64.2	61.1	1.08	1.15	1.12	1.11	62.4	73.9	68.4	68.0
<b>BARLEY</b>											
World	79.6	77.5		2.27	2.14			180.6	166.2	173.0	171.5
United States	4.1	3.0		2.83	2.07			11.5	6.3	9.8	9.7
Total Foreign	75.5	74.5	72.8	2.24	2.15	2.25	2.22	169.1	159.9	163.2	161.8
Australia	2.4	2.4	2.4	1.46	1.40	1.51	1.52	3.5	3.4	3.4	3.7
Canada	5.0	4.1	4.5	2.79	2.44	2.67	2.67	14.0	10.1	12.0	12.0
China	3.4	3.3	3.4	1.78	1.92	2.05	2.05	6.0	6.3	6.9	6.9
Eastern Europe	4.3	4.3	4.3	3.80	3.73	3.76	3.69	16.3	16.2	16.3	15.9
EC-12	12.2	12.2	11.8	3.83	4.13	3.98	3.87	46.8	50.5	46.8	45.7
Other W. Europe	1.7	1.8	1.7	3.10	3.20	3.50	3.34	5.2	5.7	5.8	5.6
Turkey	3.2	3.3	3.3	1.88	2.12	1.82	1.82	6.0	7.0	6.0	6.0
USSR	30.7	29.7	29.0	1.91	1.50	1.79	1.79	58.4	44.5	52.0	52.0
Others	12.7	13.2	12.5	1.02	1.22	1.13	1.13	12.9	16.1	14.1	14.1

FOOTNOTES AT END OF TABLE

CONTINUED

JULY 1989

FOREIGN PRODUCTION ESTIMATES DIVISION, FAS, USDA

TABLE 4 (Continued)  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---				
	Prel.	Proj.	1987/88 1988/89 1989/90	Prel.	1987/88 1988/89	June July	Prel.	1987/88 1988/89	June July	1987/88	1989/90	
	1987/88	1988/89	1989/90	1987/88	1988/89	1989/90	1987/88	1988/89	1989/90	June	July	
CORN	---Million Hectares---				---Metric Tons Per Hectare---				---Million Metric Tons---			
World	125.1	125.0			3.57	3.18			447.0	397.8	476.9	466.3
United States	24.0	23.5			7.50	5.31			179.6	125.0	199.4	189.2
Total Foreign	101.1	101.5	101.9		2.64	2.69	2.71	2.72	267.3	272.8	277.5	277.0
Maj. Foreign Exporters	8.0	7.1	7.9		2.35	2.83	2.68	2.68	18.8	20.0	21.0	21.0
Argentina	2.6	1.7	2.5		3.46	2.76	3.40	3.40	9.0	4.7	8.5	8.5
South Africa	3.7	3.8	3.8		1.93	2.91	2.13	2.13	7.1	11.0	8.0	8.0
Thailand	1.8	1.6	1.6		1.56	2.69	2.81	2.81	2.7	4.3	4.5	4.5
Major Importers	21.9	22.1	22.2		3.78	3.81	3.97	3.99	82.9	84.3	88.4	88.6
Eastern Europe	7.3	7.4	7.4		4.11	3.72	4.58	4.74	30.0	27.3	34.0	35.0
EC-12	3.7	4.0	3.9		6.99	7.11	6.75	6.60	25.9	28.5	26.4	25.6
Other W. Europe	0.2	0.2	0.2		8.01	8.31	8.08	8.08	1.8	1.9	1.7	1.7
Mexico	6.0	6.0	6.1		1.65	1.68	1.69	1.69	9.9	10.1	10.3	10.3
USSR	4.6	4.4	4.5		3.24	3.62	3.44	3.44	14.8	16.0	15.5	15.5
Other Maj. Import. 2/	0.1	0.1	0.1		4.17	4.18	4.18	4.18	0.5	0.4	0.5	0.5
Other Foreign	71.2	72.2	71.9		2.33	2.33	2.33	2.33	165.6	168.5	168.2	167.4
Brazil	13.2	13.5	13.0		1.88	1.93	1.85	1.85	24.7	26.0	24.0	24.0
Canada	1.0	1.0	1.0		7.02	5.47	6.19	6.20	7.0	5.4	6.0	6.2
China	20.2	19.6	20.0		3.92	3.95	3.89	3.90	79.2	77.4	78.5	78.0
Egypt	0.8	0.8	0.8		5.14	4.97	5.21	5.21	4.2	4.1	4.3	4.3
India	5.5	5.9	5.8		1.00	1.36	1.34	1.34	5.5	8.0	7.8	7.8
Indonesia	2.7	2.6	2.6		1.79	1.92	1.92	1.92	4.8	5.0	5.0	5.0
Philippines	3.8	3.8	3.8		1.15	1.16	1.18	1.18	4.3	4.4	4.5	4.5
Zimbabwe	1.3	1.3	1.3		1.60	1.44	1.60	1.60	2.0	1.8	2.0	2.0
Others	22.8	23.8	23.6		1.49	1.53	1.51	1.51	33.9	36.5	36.0	35.6
SORGHUM												
World	42.0	44.4			1.33	1.26			56.0	55.9	60.1	59.5
United States	4.3	3.7			4.38	4.00			18.8	14.7	17.8	17.1
Total Foreign	37.7	40.7	40.6		0.99	1.01	1.04	1.04	37.2	41.2	42.4	42.4
Argentina	1.0	0.7	1.0		3.00	1.79	3.00	3.00	3.0	1.3	3.0	3.0
Australia	0.7	0.6	0.8		1.86	1.68	1.88	1.88	1.4	1.1	1.5	1.5
China	1.9	1.8	1.9		2.91	2.96	2.93	2.93	5.4	5.3	5.5	5.5
India	15.6	16.2	16.0		0.61	0.71	0.69	0.69	9.5	11.5	11.0	11.0
Mexico	1.4	1.3	1.4		2.91	2.92	2.98	2.98	4.0	3.7	4.1	4.1
Nigeria	4.3	4.4	4.4		0.67	0.80	0.80	0.80	2.9	3.5	3.5	3.5
South Africa	0.3	0.3	0.3		1.52	1.58	1.65	1.65	0.5	0.4	0.5	0.5
Sudan	3.0	5.3	4.8		0.43	0.76	0.63	0.63	1.3	4.0	3.0	3.0
Thailand	0.2	0.2	0.2		1.10	1.43	1.45	1.45	0.2	0.3	0.3	0.3
Others	9.3	9.9	9.8		0.97	1.03	1.01	1.01	9.0	10.2	9.9	9.9

FOOTNOTES AT END OF TABLE

CONTINUED

TABLE 4 (Continued)  
Coarse Grains Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---			
	Prel.	Proj.		Prel.	1989/90	Proj.	Prel.	1989/90	Proj.	Prel.	1989/90
	: 1987/88	1988/89	1989/90	: 1987/88	1988/89	June	July	: 1987/88	1988/89	June	July
OATS											
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	23.6	22.4		1.84	1.68			43.3	37.7	43.3	42.7
United States	2.8	2.3		1.94	1.40			5.4	3.2	6.1	5.6
Total Foreign	20.8	20.1	20.3	1.82	1.72	1.84	1.83	37.9	34.5	37.2	37.1
USSR	11.8	10.9	11.0	1.57	1.40	1.55	1.55	18.5	15.3	17.0	17.0
Maj. Foreign Exporters	3.5	3.7	3.8	1.96	1.85	1.94	1.93	6.8	6.7	7.2	7.3
Argentina	0.5	0.4	0.5	1.30	1.10	1.39	1.39	0.7	0.4	0.6	0.6
Australia	1.3	1.4	1.3	1.32	1.41	1.26	1.32	1.7	2.0	1.7	1.7
Canada	1.3	1.4	1.6	2.37	2.10	2.20	2.19	3.0	3.0	3.3	3.5
Sweden	0.4	0.4	0.4	3.63	3.14	3.72	3.37	1.4	1.3	1.6	1.5
Other Foreign	5.5	5.5	5.5	2.27	2.26	2.36	2.32	12.6	12.5	13.0	12.7
China	0.6	0.6	0.6	1.10	1.19	1.20	1.20	0.6	0.7	0.7	0.7
Eastern Europe	1.4	1.4	1.4	2.80	2.62	2.79	2.72	4.0	3.7	4.0	3.9
East Germany	0.1	0.2	0.2	4.28	3.30	4.52	3.81	0.6	0.5	0.7	0.6
Poland	0.9	0.9	0.9	2.84	2.62	2.70	2.70	2.4	2.2	2.3	2.3
EC-12	1.8	1.8	1.7	3.02	3.13	3.13	3.07	5.3	5.5	5.4	5.3
France	0.3	0.3	0.3	3.91	3.86	3.90	3.90	1.0	1.0	1.0	1.0
West Germany	0.6	0.6	0.5	4.30	4.23	4.44	4.29	2.4	2.4	2.4	2.3
Finland	0.4	0.4	0.4	2.21	2.21	2.90	2.75	0.8	0.9	1.2	1.1
Norway	0.1	0.1	0.1	3.87	2.98	3.68	3.68	0.5	0.4	0.5	0.5
Others	1.3	1.3	1.3	1.06	1.07	1.07	1.07	1.3	1.4	1.4	1.4
RYE											
World	15.9	15.9		2.14	2.07			34.0	33.0	34.4	33.8
United States	0.3	0.2		1.82	1.55			0.5	0.4	0.5	0.4
Total Foreign	15.6	15.6	15.8	2.15	2.08	2.14	2.11	33.5	32.6	33.9	33.4
USSR	9.7	10.1	10.0	1.86	1.83	1.80	1.80	18.1	18.5	18.0	18.0
Maj. Foreign Exporter											
Canada	0.3	0.2	0.4	1.58	1.05	1.75	1.74	0.5	0.3	0.7	0.6
Other Foreign											
Eastern Europe	4.0	3.9	3.9	2.75	2.58	2.81	2.74	11.0	10.0	11.0	10.8
East Germany	0.7	0.6	0.7	3.49	2.93	3.48	3.12	2.3	1.8	2.3	2.0
Poland	3.0	2.9	2.9	2.65	2.51	2.70	2.70	7.8	7.2	7.8	7.8
Czechoslovakia	0.2	0.2	0.2	3.13	3.42	3.42	3.42	0.5	0.5	0.5	0.5
EC-12	1.0	0.9	1.0	2.93	3.05	3.04	3.00	3.0	2.9	2.9	2.9
Denmark	0.1	0.1	0.1	3.77	4.58	4.20	4.20	0.5	0.4	0.4	0.4
West Germany	0.4	0.4	0.4	3.89	4.19	4.27	4.18	1.6	1.6	1.7	1.6
Others	0.6	0.5	0.6	1.77	2.03	2.15	2.00	1.0	1.0	1.2	1.1

1/ Total of barley, corn, sorghum, oats, and rye shown below plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

TABLE 5  
Rice Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	Area---		Yield---		Production---		Milling Rate---		Production---	
	1987/88		1988/89		1989/90		1989/90		1989/90 Proj.	
	Prel.	Proj.	Prel.	Proj.	June	July	1987/88	1988/89	June	July
World	141.0	143.8	3.27	3.33	460.9	479.0	477.8	485.9	67.8	67.7
United States	0.9	1.2	6.23	6.17	5.9	7.2	7.2	6.9	69.9	70.0
Total Foreign	140.1	142.6	144.1	144.1	3.25	3.31	3.27	3.32	455.1	471.7
Maj. Foreign Exporters	16.0	16.7	16.9	16.9	2.09	2.24	2.26	33.4	37.6	38.1
Burma	4.4	4.8	4.8	4.8	2.43	2.55	2.50	10.8	12.2	12.0
Pakistan	2.0	1.9	2.1	2.1	2.48	2.40	2.56	4.9	4.7	5.3
Thailand	9.6	10.0	10.0	10.0	1.85	2.07	2.08	17.8	20.7	20.8
Major Importers	12.9	13.0	13.0	13.0	4.18	4.29	4.32	54.0	55.8	56.0
EC-12	0.3	0.3	0.3	0.3	5.78	5.59	5.65	1.9	1.9	1.9
Indonesia	9.8	9.8	9.8	9.8	4.24	4.32	4.40	41.5	42.3	43.1
Nigeria	0.6	0.6	0.6	0.6	1.31	1.42	1.49	0.8	0.9	1.0
Republic of Korea	1.3	1.3	1.2	1.2	6.02	6.64	6.40	7.6	8.4	7.8
Other Maj. Import. */	0.9	1.0	1.0	1.0	2.33	2.39	2.37	2.1	2.3	2.3
Other Foreign	111.2	112.9	114.2	114.2	3.31	3.35	3.37	367.7	378.4	384.9
Australia	0.1	0.1	0.1	0.1	7.12	7.50	7.19	0.8	0.8	0.8
Bangladesh	10.3	9.2	10.5	10.5	2.24	2.52	2.24	23.1	23.0	23.6
Brazil	6.0	5.5	5.5	5.5	1.98	1.94	1.93	11.8	10.7	10.6
China	32.2	31.9	31.9	31.9	5.42	5.37	5.49	174.4	171.0	175.0
India	38.3	41.5	41.3	41.3	2.21	2.39	2.36	84.6	99.0	97.5
Japan	2.1	2.1	2.1	2.1	6.19	5.82	6.32	13.3	12.4	13.5
Philippines	3.3	3.4	3.4	3.4	2.65	2.66	2.69	8.7	8.9	9.2
USSR	0.7	0.7	0.7	0.7	4.13	4.27	4.03	2.7	2.9	2.7
Vietnam	5.6	5.8	5.8	5.8	2.74	2.83	2.84	15.3	16.3	16.5
Others	12.6	12.9	12.9	12.9	2.62	2.59	2.76	33.1	33.4	35.7

\*/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

TABLE 6  
Oilseeds Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---			---Production---		
	Prel. Proj.			1989/90 Proj.			Prel. 1989/90 Proj.		
	1987/88	1988/89	1989/90	1987/88	1988/89	June July	1987/88	1988/89	June July
	---Million Hectares---			---Metric Tons Per Hectare---			---Million Metric Tons---		
SOYBEANS									
World	54.15	55.34		1.91	1.69		103.34	93.47	109.06
United States	23.06	23.22		2.27	1.80		52.33	41.88	53.07
Total Foreign	31.09	32.11	34.07	1.64	1.61	1.64	51.01	51.60	55.99
Maj. Foreign Exporters	14.78	15.95	17.00	1.88	1.79	1.85	27.72	28.60	31.50
Argentina	4.26	4.00	5.00	2.28	1.65	2.10	9.70	6.60	10.50
Brazil	10.52	11.95	12.00	1.71	1.84	1.75	18.02	22.00	21.00
Other Foreign	16.31	16.16	17.07	1.43	1.42	1.43	23.29	23.00	24.49
Canada	0.46	0.53	0.53	2.75	2.17	2.36	1.27	1.15	1.25
China	8.41	8.02	8.30	1.48	1.45	1.45	12.43	11.65	12.00
Eastern Europe	0.53	0.56	0.57	1.31	1.19	1.44	0.69	0.67	0.82
India	1.68	1.80	1.80	0.58	0.78	0.72	0.98	1.40	1.30
Indonesia	0.95	1.05	1.20	1.00	1.05	1.04	0.95	1.10	1.25
Mexico	0.39	0.15	0.38	1.92	2.07	1.84	0.75	0.30	0.70
Paraguay	0.62	0.69	0.76	1.79	1.74	1.84	1.10	1.20	1.40
USSR	0.78	0.76	0.78	0.91	1.16	1.03	0.71	0.88	0.80
Others	2.49	2.61	2.75	1.77	1.78	1.81	4.41	4.65	4.97
COTTONSEED									
World	31.47	33.94		0.99	0.95		31.14	32.28	31.13
United States	4.06	4.83		1.29	1.14		5.23	5.50	4.45
Total Foreign	27.41	29.10	28.90	0.95	0.92	0.92	25.90	26.79	26.68
China	4.84	5.53	5.30	1.49	1.28	1.40	7.22	7.07	7.40
India	6.47	7.40	7.70	0.48	0.48	0.47	3.09	3.56	3.65
Pakistan	2.57	2.50	2.60	1.15	1.17	1.16	2.95	2.91	3.01
USSR	3.53	3.45	3.30	1.27	1.45	1.39	4.49	5.02	4.58
Others	10.00	10.22	10.00	0.82	0.80	0.80	8.17	8.22	8.05
PEANUTS									
World	18.16	18.95		1.12	1.16		20.37	21.98	22.38
United States	0.63	0.66		2.62	2.74		1.64	1.81	2.04
Total Foreign	17.53	18.29	18.22	1.07	1.10	1.12	18.73	20.17	20.34
Brazil	0.10	0.09	0.12	1.67	1.56	1.57	0.17	0.14	0.18
China	3.02	2.91	3.05	2.04	1.99	2.03	6.17	5.80	6.20
India	6.74	7.60	7.40	0.79	0.99	0.95	5.30	7.50	7.00
Senegal	0.85	0.90	0.86	1.10	0.76	0.95	0.93	0.69	0.82
South Africa	0.15	0.19	0.19	1.33	1.24	1.24	0.20	0.23	0.23
Sudan	0.58	0.58	0.55	0.76	0.78	0.73	0.44	0.45	0.40
Others	6.10	6.03	6.06	0.91	0.89	0.91	5.52	5.36	5.51

CONTINUED

TABLE 6 (Continued)  
Oilseeds Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---			---Production---		
	Prel. Proj.			1989/90 Proj.			Prel. 1989/90 Proj.		
	1987/88	1988/89	1989/90	1987/88	1988/89	June	1987/88	1988/89	June
	: ---Million Hectares---			: ---Metric Tons Per Hectare---			: ---Million Metric Tons---		
SUNFLOWERSEED									
World	15.24	15.34		1.35	1.32		20.62	20.32	21.47
United States	0.72	0.81		1.65	1.04		1.18	0.85	1.05
Total Foreign	14.52	14.53	15.32	1.34	1.34	1.33	19.44	19.48	20.42
Argentina	2.06	2.20	2.60	1.36	1.32	1.35	2.80	2.90	3.50
China	0.89	0.94	0.94	1.40	1.43	1.45	1.24	1.34	1.36
EC-12	2.21	2.07	2.09	1.79	1.84	1.63	3.95	3.81	3.40
East Europe	1.38	1.31	1.35	1.73	1.64	1.80	2.39	2.15	2.43
USSR	4.16	4.28	4.30	1.46	1.44	1.47	6.08	6.16	6.30
Others	3.84	3.73	4.04	0.78	0.84	0.85	2.99	3.12	3.43
RAPESEED									
World	16.69	17.67	16.82	1.39	1.24	1.27	23.23	21.93	21.39
Total Foreign	16.69	17.67	16.82	1.39	1.24	1.27	23.23	21.93	21.39
Canada	2.67	3.65	2.95	1.44	1.16	1.25	3.85	4.24	3.70
China	5.27	4.93	4.90	1.25	1.02	1.16	6.61	5.04	5.70
EC-12	1.86	1.84	1.56	3.20	2.81	2.92	5.95	5.18	4.55
East Europe	0.92	0.88	0.96	2.35	2.49	2.46	2.17	2.19	2.36
India	4.51	4.70	4.60	0.72	0.79	0.72	3.24	3.70	3.30
Others	1.46	1.66	1.86	0.97	0.95	0.96	1.42	1.58	1.78
FLAXSEED									
World	4.02	3.91		0.56	0.44		2.26	1.70	2.14
United States	0.19	0.09		1.01	0.45		0.19	0.04	0.09
Total Foreign	3.83	3.82	3.96	0.54	0.43	0.52	2.07	1.66	2.06
Argentina	0.69	0.55	0.60	0.80	0.82	0.82	0.55	0.45	0.49
Canada	0.59	0.55	0.65	1.23	0.76	1.15	0.73	0.41	0.75
India	1.15	1.35	1.25	0.32	0.30	0.29	0.37	0.40	0.36
USSR	1.07	1.04	1.10	0.21	0.17	0.20	0.23	0.18	0.22
Others	0.33	0.33	0.36	0.59	0.65	0.66	0.20	0.22	0.24
MAJOR OILSEEDS TOTAL	139.72	145.13		1.44	1.32		200.97	191.68	207.57
COPRA	--	--	--	--	--	--	4.32	4.52	4.70
PALM KERNEL	--	--	--	--	--	--	2.69	2.89	3.08
TOTAL OILSEEDS	--	--	--	--	--	--	207.98	199.09	215.00
PALM OIL *	--	--	--	--	--	--	8.38	9.11	9.84

TABLE 7

## Cotton Area, Yield, and Production: World and Selected Countries and Regions

Country/Region	---Area---			---Yield---				---Production---				
	Prel. Proj.			1989/90 Proj.				Prel. 1989/90 Proj.				
	1987/88	1988/89	1989/90	1987/88	1988/89	June	July	1987/88	1988/89	June	July	
	---Million Hectares---				---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.1	34.0			566	538			80.8	84.0	82.5	80.8
United States	4.1	4.8			791	694			14.8	15.4	13.5	12.0
Total Foreign	27.0	29.2	29.2		532	512	518	514	66.1	68.6	69.0	68.8
Maj. Foreign Exporters	12.8	13.5	13.2		764	750		763	45.0	46.4		46.2
Australia	0.2	0.2	0.2		1212	1451		1325	1.3	1.2		1.4
Central America 1/	0.1	0.1	0.1		811	794		915	0.4	0.4		0.5
China	4.8	5.5	5.3		876	751		822	19.5	19.1		20.0
Egypt	0.4	0.4	0.4		845	718		814	1.6	1.4		1.6
Mexico	0.2	0.3	0.2		956	1178		974	1.0	1.4		0.9
Pakistan	2.6	2.5	2.6		573	578		569	6.8	6.6		6.8
Sudan	0.3	0.3	0.3		416	462		448	0.6	0.7		0.7
Turkey	0.6	0.7	0.7		916	919		919	2.5	3.0		2.9
USSR	3.5	3.4	3.3		700	799		759	11.3	12.6		11.5
Major Importers 2/	0.3	0.4	0.4		834	848		909	1.2	1.7		1.6
Other Foreign	13.9	15.3	15.6		310	293		293	19.8	20.5		21.0
Argentina	0.5	0.5	0.5		547	361		385	1.3	0.8		0.9
Brazil	2.2	2.3	2.4		355	307		321	3.5	3.3		3.5
India	6.5	7.4	7.7		239	241		236	7.1	8.2		8.4
Syria	0.1	0.2	0.2		915	672		794	0.5	0.5		0.6
Others	4.6	4.8	4.8		346	344		343	7.3	7.7		7.6

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

Table 8

NOTE: The table below presents a 8-year record of the difference between the July projections and the final estimates. Using world wheat production as an example, changes between July projections and the final estimates have averaged 16.8 million tons (3.4 percent) and ranged from -34.6 to 15.4 million tons. The July projection has been below the final 4 times and above the final 4 times.

## RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1988/89 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference		Number of Years 2/	
	Percent		---Million Metric Tons---		Number of Years 2/	
<b>WHEAT</b>						
World	3.4	16.8	-34.6	15.4	4	4
U.S.	1.9	1.2	-2.6	2.0	3	5
Foreign	3.8	16.3	-32.0	16.1	4	4
<b>COARSE GRAINS 3/</b>						
World	2.7	20.3	-22.2	53.6	5	3
U.S.	10.1	19.0	-29.4	57.7	4	4
Foreign	2.0	11.0	-16.0	24.2	3	5
<b>RICE (Milled)</b>						
World	2.7	8.3	-24.0	13.0	5	3
U.S.	4.5	0.2	-0.5	0.3	2	3
Foreign	2.7	8.3	-24.3	12.7	5	3
<b>SOYBEANS</b>						
World	4.0	3.6	-3.6	7.5	3	5
U.S.	6.8	3.3	-5.4	9.7	4	4
Foreign	5.9	2.3	-3.0	3.2	4	4
	---Million 480-lb. Bales---					
<b>COTTON</b>						
World	4.6	3.6	-13.3	5.7	7	1
U.S.	10.8	1.4	-2.8	1.0	6	2
Foreign	3.8	2.6	-12.1	4.7	4	3
<b>UNITED STATES</b>	-----Million Bushels-----					
<b>CORN</b>	12.4	727	-1085	2035	5	3
<b>SORGHUM</b>	13.8	107	-213	171	7	1
<b>BARLEY</b>	5.0	28	-43	52	1	5
<b>OATS</b>	11.2	44	-37	144	3	5

1/ The final estimate for 1981/82-1987/88 is defined as the November estimate following the marketing year and for 1988/89 last month's estimate.

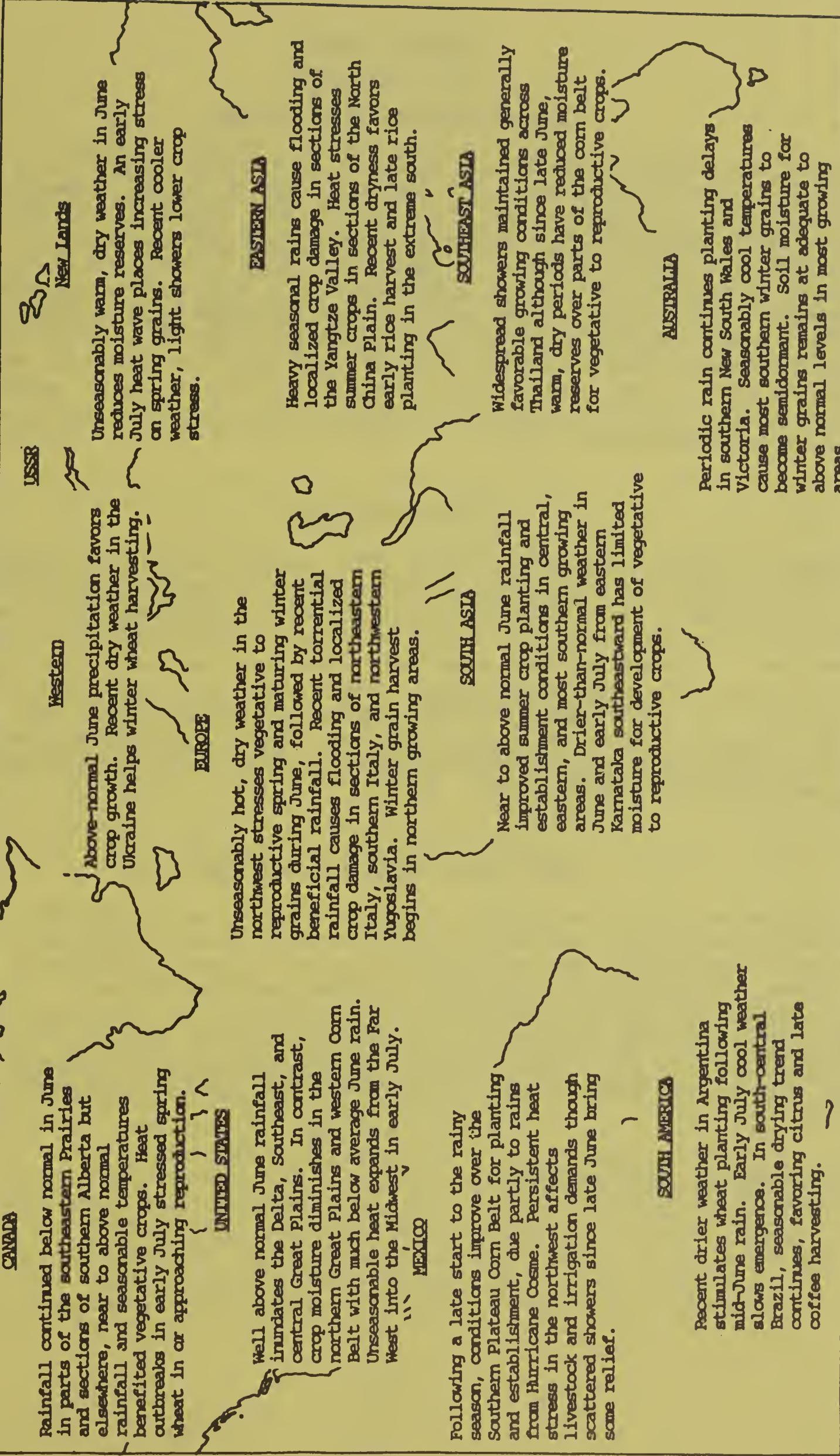
2/ May not total eight if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.

# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

Date July 12, 1989

NOAA/USDA JOINT AGRICULTURAL WEATHER FACILITY



(More details are available in the Weekly Weather and Crop Bulletin. Subscription information may be obtained by calling (202) 447-7917).

## WEATHER BRIEFS

### EUROPE TRENDING WARM AND DRY

Rainfall was rather erratic across northern and western Europe during June and early July but accumulations were relatively close to normal in most areas. Rainfall was mostly below normal from northern East Germany to northwestern Poland and from southwestern France to northeastern Spain. Episodes of unusually warm weather occurred in most of northern and western Europe from mid-June into early July, likely stressing both filling winter crops and vegetative summer crops. Fruit and nut crops, especially in southern France and northeastern Spain, may also have been stressed by the heat and dryness. Rainfall accumulations from March through early July have generally been near normal in northern and western Europe, but wet weather in April, nearly dry weather in May, and erratic rains in June and early July have not favored normal crop development.

### RAINY IN AUSTRALIA

Australia's southern hemisphere winter rainy season has provided ample moisture for most winter grain areas and rangeland. Analysis of satellite imagery from early July indicated winter grains and pastures were in excellent condition in Western Australia, South Australia, northern New South Wales, and Queensland. Rainfall has been especially persistent and heavy in much of Victoria and southern New South Wales. These heavy rains have apparently interfered with the seeding of winter grains, especially winter wheat, but pastures appear to be in very good condition. Reports from Australia indicate farmers will attempt to substitute quicker maturing barley where conditions have been too wet to plant wheat.

### ASIAN MONSOON OFF TO GOOD START

The 1989 Asian monsoon has begun roughly on schedule and has brought seasonable rainfall to most of South and Southeast Asia through early July. Rainfall accumulations have been close to normal in most of Thailand, Bangladesh, and India despite occasional relatively dry periods. A few areas, most notably portions of southern and southeastern India, have been somewhat drier and warmer than usual during June and early July. The months of July and August will be the critical period for areas dependent on monsoon rains since this is when rainfall typically reaches its greatest intensity and extent.

---

David N. Secora (202) 475-5134

## PRODUCTION BRIEFS

### BRAZIL: 1989/90 SUGAR PRODUCTION FORECAST REDUCED

Brazil's 1989/90 sugar production is now forecast at 7.5 million tons (raw basis), 7 percent less than the first forecast of 8.1 million tons made in May, 1989. The new forecast, 13 percent below the revised 1988/89 estimate of 8.58 million tons, is based on recently announced Brazilian Sugar and Alcohol Institute authorizations allocating the 1989/90 sugarcane crop for sugar and alcohol production. The lower production will depress exports which are now forecast at 1.3 million tons, down 35 percent from the May projection.

### IRELAND: RAPID GROWTH IN PRODUCTION OF POND RAISED SALMON

Ireland's production of salmon raised in ponds is expected to total just over 7,200 tons in 1989, up over 40 percent from 1988. Data from the Irish Salmon Association indicate production started in 1979 with output of only 13 tons. Use of large pens, which result in firmer and less oily fish, are said to make Irish salmon superior to those raised in other countries. Approximately 95 percent of Ireland's production is exported, with France, the United States, and Japan the leading markets.

### SOVIET UNION: SUGAR PRODUCTION ESTIMATE REDUCED

The Soviet Union's 1988/89 sugar production from beets is now estimated at 8.9 million tons (raw basis), 5 percent less than the 9.4-million-ton estimate made in May 1989. The reduction, reported by the U.S. agricultural counselor in Moscow, is based on recently published official Soviet data. In light of this reduction, continuing strong consumption, and low stock levels, imports are projected to climb to 5.8 million tons -- over 9 percent above the May forecast.

### KENYA: SHORT FEED SUPPLIES AFFECTING POULTRY AND PORK

Kenya's hog and poultry industries are currently facing a critical situation due to severe shortages of commercial feeds according to the U.S. agricultural attache in Nairobi. Although shortages and low quality of feed are continuing problems faced by Kenya's livestock producers, in 1989 deliveries of wheat to flour millers have been erratic, seriously affecting deliveries of bran to feed millers. Hog farmers claim that production is no longer profitable because growing and fattening takes too long. Poultry producers say the feed shortages have lengthened the production cycle from 8 to 10 weeks, while egg producers claim the shortages have cut flock productivity in half. Lack of demand for broilers also has affected the hatching industry, causing thousands of unmarketable day-old chicks to be destroyed. The crisis is unlikely to abate until the start of the feed grain harvest, usually around September 1.

#### PHILIPPINES: RICE PRODUCTIVITY PROGRAM ANNOUNCED

The Philippine Department of Agriculture announced plans to implement a dry season rice production program which includes an exchange of rough rice for fertilizer. Farmers would receive four bags of fertilizer per hectare during planting (November 1989-January 1990), and would be required to return three bags of unmilled rice to the National Food Authority after harvest (March-May 1990) to replenish buffer stocks. In effect, the exchange provides a fertilizer subsidy to farmers of about US\$23 per hectare. In addition, a subsidy of about US\$6 per hectare would be provided toward the cost of high-yielding varieties of rice seed which will be distributed under the program. The seed subsidy reflects 40 percent of the commercial cost. A total of about US\$92 million has been earmarked for the program.

#### CHINA: WHEAT PRODUCTION OUTLOOK FAVORABLE

Reports from China indicate a very good wheat crop this year. With the possible exception of Shandong, all the major winter wheat producing provinces are predicting a larger harvest in 1989 than in 1988, because of greater planted area last fall and timely rainfall this spring. In addition, spring wheat planted area expanded by an estimated 500,000 hectares and weather conditions have been favorable for crop development thus far this summer. The Chinese are predicting that the 1989/90 total wheat crop will equal or exceed the record of 90 million tons set in 1986.

#### CHINA: NEW SERIES REVISIONS

China's State Statistical Bureau has recently released new wheat, corn, and soybean production figures for 1987 and 1988 based on a change in statistical methodology. China previously used two sets of data to develop its production estimates, a statistical sampling technique and the traditional method of enumeration and reporting from lower to higher administrative authorities. Chinese officials now report that the figures derived from the statistical survey are sufficiently reliable to allow them to use the sample method exclusively.

#### AUSTRALIA: HONEY PRODUCTION HURT BY WET WEATHER

The 1988/89 (July/June) Australian honey crop, originally forecast at 29,000 tons, is now estimated at 26,500 tons because of the unusually wet conditions experienced by eastern states since early 1989. The decline in honey output is likely to lead to a 150 ton increase in imports, despite a New South Wales honey-import ban enacted in late February 1989. The ban is significant to the Australian honey industry as 75 percent of the nation's imports had been entering through that state. There is no indication, at this time, that the ban will spread to other States.

BRAZIL: 1988/89 ORANGE CROP UP 5 PERCENT

The U.S. Agricultural Officer in Sao Paulo forecasts the 1988/89 orange crop in Sao Paulo at 265 million boxes (10.812 million tons), up from 250 million boxes (10.2 million tons) projected in May. This raises total Brazilian production to 12.765 million tons, up 5 percent from 12.150 million tons projected in May. The revision in Sao Paulo is due to continued good weather, a heavy load of oranges on trees, and improved grove care because of favorable prices. The bulk of the harvest will be from September to November, making weather conditions in the next two months critical.

COTE D'IVOIRE: COCOA PRODUCTION REVISED UPWARD

The 1988/89 Ivoirian cocoa production forecast has been revised upward by 120,000 tons to 800,000 tons, according to the U.S. agricultural attache in Abidjan. The revision is based on arrivals at purchasing agencies as of the end of June, which were considerably above expectations. The harvest of the 1988/89 crop will be completed by about the end of September.

**WORLD OILSEEDS PRODUCTION IN 1989/90**

World oilseed production during 1989/90 is forecast to increase to a new high of 215 million tons, 4 percent above the current record of 208 million tons set in 1987/88. This level is 8.6 percent over last year's output which was hampered by poor yields due to drought conditions, particularly in the United States and Canada. While harvested area is forecast to increase for soybeans, sunflower, and flaxseed, and decline for cotton, peanuts, and rapeseed, a return to more normal yields is expected to increase output in all major oilseeds except rapeseed and cottonseed.

Soybean output is forecast to climb by 17 percent over 1988/89 to 109 million tons from an estimated 58 million hectares, both new records. As a percentage of total oilseed production, soybeans will return to its 1987/88 level of 50 percent, up from 47 percent in 1988/89. The United States is forecast to increase area 5 percent to 24 million hectares--the largest area since 1985/86--and recover from last season's poor output level with an estimated increase of 11 million tons. This will account for 72 percent of the estimated 16-million-ton rise in world soybean production. Brazil's 1989/90 soybean production is forecast to decline slightly to 21 million tons with a return to average yields, while Argentina is expected to rebound from its disastrous 1988/89 season with a 25-percent increase in area and a 3.9-million-ton rise in production to 10.5 million tons.

World cottonseed production for 1989/90 is forecast at 31.9 million tons, down 0.4 million or 1 percent from last year's output as world cotton area is forecast to be down by 0.8 million hectares or 2 percent. The United States is forecast to decrease area 13 percent to 4.2 million hectares, reducing projected output of cottonseed by 0.5 million tons or 9 percent from last year. The USSR also is estimated to experience a drop in production to 4.9 million tons due to a slightly reduced area estimate and yields somewhat lower than last year. Other major producers including China, India, and Pakistan are forecast to cushion the overall decline with increased output. Based on an average yield, China is forecast to harvest an additional 0.3 million tons of cottonseed this season, despite a drop in area of 0.2 million hectares. India and Pakistan are both forecast to increase area and production. Indian area is expected to climb to 7.7 million hectares as production follows with a 3.7-million-ton crop, nearly 0.1 million above last year. Pakistan is forecast to increase area by 0.1 million hectares to 2.6 million and harvest 3.0 million tons, 0.1 million over the previous year.

Total peanut, sunflowerseed, and rapeseed production are individually forecast to account for about 10 percent of total oilseed output. Although 1989/90 peanut area is forecast to be down marginally, production is forecast to climb to a record 22.3 million tons, up 0.4 million or 2 percent over last year. The United States and China are forecast to increase production by 0.2 million tons and 0.4 million tons, respectively, while India, the world's largest peanut producer, is forecast to yield a crop of 7.0 million tons, down 0.5 million from last year.

World sunflowerseed production is estimated to increase by 1.3 million tons, 6 percent over last year. The largest increase in output is forecast for Argentina--up 0.6 millions tons from last year to 3.5 million. The United States follows with an estimated increase of 0.3 million tons, for a total of 1.2 million. Eastern Europe is also forecast to increase output by 0.3 million tons, for a crop equal to 2.4 million. Offsetting these production gains is an estimated 0.4-million-ton decline for European Community sunflowerseed production during 1989/90, dropping its total sunflowerseed output to 3.4 million--the second decline in as many years.

While world rapeseed production has increased faster than any other major oilseed crop in recent years (up 280 percent since 1974/75), it peaked at 23.2 million tons in 1987/88. Production in 1989/90 is forecast to decline by an additional 0.5 million tons or 2.5 percent for a total crop of 21.4 million. The reduction in output is based on declining area. Canadian production is forecast to decline by 0.5 million tons to 3.7 million. The European Community rapeseed is forecast to decline an estimated 0.6 million tons to 4.5 million. India which is also expected to experience yields less abundant than last year, is expected to be down 0.4 million tons to 3.3 million. On the up side, China has had good planting conditions and, with estimated normal yields, is expected to increase production by 0.7 million tons over last year to 5.7 million--still below their 1987/88 crop of 6.1 million.

While flaxseed area has been declining for some time, production has remained relatively unchanged due to improvements in yield. Recent production shortages and strong overall oilseed prices have encouraged new interest in some countries. World production for 1989/90 is forecast at 2.2 million tons, up 27 percent, due to increased area estimates and a return to more normal yield prospects. Of the major producers, Canada is forecast to increase crop area by 0.1 million hectares, producing an estimated 0.8 million tons. This would be up 0.3 million or 81 percent from last year's drought-reduced crop. Argentina, the United States, and the USSR are all forecast to increase both area and output during 1989/90 as well. Only India is forecast to harvest a lower flaxseed crop during 1989/90, dropping to 360,000 tons due to reduced area.

Copra and palm kernel production is estimated to increase during 1989/90. Copra production is estimated at 4.7 million tons, up 0.2 million from last year. The Philippines, which accounts for over 40 percent of world production, is forecast at 2.0 million tons, up 150,000 tons or 8 percent over last year. Further improvements are expected as the Philippines continues to recover from drought conditions over the past 2 years and typhoon damage sustained in late 1988. Indonesia, the second largest producer, is forecast to produce 1.3 million tons, up 70,000 tons or 6 percent from last year.

The production of palm kernel for 1989/90 is estimated at a record 3.1 million tons, up 0.2 million or 7 percent from last year. Malaysia, by far the largest producer, is expected to grow 1.7 million tons during 1989/90, up 0.1 million or 8 percent from last year's output.

Table 9

## OILSEEDS PRODUCTION

(Million Metric Tons)

	Palm Oil	Copra	Palm Kernel	Flaxseed	Rapeseed	Sunflower Seed	Peanut	Cotton Seed	Soybean	Total Production
<b>UNITED STATES</b>										
1974/75				0.36		0.27	1.66	4.09	33.10	39.49
1975/76				0.40		0.54	1.75	2.92	42.14	47.74
1976/77				0.19		0.46	1.70	3.74	35.07	41.16
1977/78				0.36		1.33	1.69	5.01	48.10	56.48
1978/79				0.22		1.73	1.79	3.87	50.86	58.48
1979/80				0.31		3.31	1.80	5.24	61.53	72.18
1980/81				0.20		1.70	1.05	4.06	48.92	55.92
1981/82				0.19		2.04	1.81	5.80	54.14	63.96
1982/83				0.26		2.42	1.56	4.30	59.61	68.15
1983/84				0.18		1.45	1.50	2.79	44.52	50.43
1984/85				0.18		1.70	2.00	4.67	50.64	59.19
1985/86				0.21		1.43	1.87	4.79	57.11	65.41
1986/87				0.29		1.21	1.68	3.45	52.80	59.44
1987/88				0.19		1.18	1.64	5.23	52.33	60.58
1988/89				0.04		0.85	1.81	5.50	41.88	50.07
1989/90 July				0.09		1.05	2.04	4.45	53.07	60.69
<b>TOTAL FOREIGN</b>										
1974/75	2.92	4.48	1.10	1.96	7.84	10.46	15.19	20.42	21.55	83.00
1975/76	3.09	5.11	1.13	2.06	8.42	9.43	16.96	18.28	23.50	84.88
1976/77	3.40	4.67	1.16	1.95	7.16	9.76	14.91	17.82	24.41	81.83
1977/78	3.62	4.84	1.19	2.59	7.89	11.61	15.27	19.27	24.14	86.80
1978/79	4.18	4.22	1.32	2.25	10.72	11.02	16.13	19.04	26.67	91.36
1979/80	4.71	4.38	1.45	2.38	10.08	12.03	15.63	19.42	32.02	97.39
1980/81	4.95	4.84	1.48	1.90	11.14	11.54	15.23	20.75	32.11	98.98
1981/82	5.83	4.59	1.75	1.89	12.35	12.79	18.03	21.69	32.06	105.15
1982/83	6.35	4.48	1.80	2.24	14.80	14.27	15.88	22.36	33.96	109.78
1983/84	6.18	3.78	2.01	1.96	14.39	14.06	17.24	22.46	38.65	114.54
1984/85	6.81	4.68	2.22	2.14	17.08	16.29	17.69	29.24	42.50	131.83
1985/86	8.06	5.31	2.51	2.14	18.70	18.13	18.12	25.84	39.92	130.67
1986/87	7.98	4.71	2.50	2.37	19.55	18.04	18.71	23.73	45.21	134.81
1987/88	8.38	4.32	2.69	2.07	23.23	19.44	18.73	25.90	51.01	147.40
1988/89	9.11	4.52	2.89	1.66	21.93	19.48	20.17	26.79	51.60	149.02
1989/90 July	9.84	4.70	3.08	2.06	21.39	20.42	20.34	26.68	55.99	154.66
<b>TOTAL WORLD</b>										
1974/75	2.92	4.48	1.10	2.32	7.84	10.73	16.85	24.52	54.66	122.48
1975/76	3.09	5.11	1.13	2.46	8.42	9.97	18.70	21.20	65.64	132.62
1976/77	3.40	4.67	1.16	2.14	7.16	10.22	16.61	21.55	59.48	122.99
1977/78	3.62	4.84	1.19	2.95	7.89	12.94	16.95	24.28	72.24	143.28
1978/79	4.18	4.22	1.32	2.47	10.72	12.75	17.92	22.91	77.53	149.84
1979/80	4.71	4.38	1.45	2.69	10.08	15.34	17.43	24.67	93.55	169.57
1980/81	4.95	4.84	1.48	2.10	11.14	13.24	16.27	24.81	81.03	154.89
1981/82	5.83	4.59	1.75	2.08	12.35	14.83	19.83	27.49	86.20	169.12
1982/83	6.35	4.48	1.80	2.50	14.80	16.69	17.44	26.67	93.57	177.93
1983/84	6.18	3.78	2.01	2.14	14.39	15.51	18.74	25.25	83.17	164.97
1984/85	6.81	4.68	2.22	2.32	17.08	17.99	19.68	33.92	93.14	191.02
1985/86	8.06	5.31	2.51	2.35	18.70	19.56	19.99	30.63	97.03	196.08
1986/87	7.98	4.71	2.50	2.66	19.55	19.25	20.39	27.18	98.01	194.24
1987/88	8.38	4.32	2.69	2.26	23.23	20.62	20.37	31.14	103.34	207.98
1988/89	9.11	4.52	2.89	1.70	21.93	20.32	21.98	32.28	93.47	199.09
1989/90 July	9.84	4.70	3.08	2.14	21.39	21.47	22.38	31.13	109.06	215.35

Table 10

## OILSEEDS AREA

(Million Hectares)

	Flaxseed	Rapeseed	Sunflower Seed	Peanut	Cotton Seed	Soybean	Total Area
<b>UNITED STATES</b>							
1974/75	0.67		0.26	0.60	5.09	20.78	27.39
1975/76	0.61		0.48	0.61	3.56	21.70	26.96
1976/77	0.39		0.43	0.62	4.42	19.99	25.84
1977/78	0.50		0.96	0.61	5.37	23.40	30.85
1978/79	0.28		1.13	0.61	5.02	25.76	32.80
1979/80	0.36		2.19	0.62	5.19	28.47	36.82
1980/81	0.27		1.49	0.57	5.35	27.44	35.12
1981/82	0.23		1.54	0.60	5.60	26.78	34.76
1982/83	0.30		1.91	0.52	3.94	28.10	34.77
1983/84	0.24		1.24	0.56	2.97	25.30	30.31
1984/85	0.22		1.49	0.62	4.20	26.76	33.29
1985/86	0.24		1.15	0.59	4.14	24.92	31.04
1986/87	0.28		0.79	0.62	3.43	23.59	28.71
1987/88	0.19		0.72	0.63	4.06	23.06	28.65
1988/89	0.09		0.81	0.66	4.83	23.22	29.62
<b>TOTAL FOREIGN</b>							
1974/75	5.01	9.00	8.68	17.51	28.47	17.41	86.09
1975/76	4.99	9.57	8.70	18.31	26.40	17.62	85.59
1976/77	4.69	8.39	9.11	17.69	26.14	18.23	84.25
1977/78	5.32	9.38	10.23	17.47	27.76	20.09	90.24
1978/79	5.21	11.17	9.86	17.46	27.82	21.59	93.10
1979/80	5.22	11.62	10.28	17.38	27.08	23.01	94.59
1980/81	4.60	11.45	10.47	17.20	26.72	22.20	92.64
1981/82	4.39	12.13	11.17	17.95	27.35	23.29	96.27
1982/83	4.32	12.36	11.48	17.43	27.46	24.03	97.08
1983/84	4.14	12.77	12.03	17.23	28.02	25.50	99.68
1984/85	4.27	13.65	12.86	17.04	29.78	27.03	104.63
1985/86	4.26	14.72	14.66	17.24	27.59	27.15	105.62
1986/87	3.98	14.75	13.32	17.75	26.51	28.03	104.34
1987/88	3.83	16.69	14.52	17.53	27.41	31.09	111.07
1988/89	3.82	17.67	14.53	18.29	29.10	32.11	115.52
1989/90 July	3.96	16.82	15.32	18.22	28.90	34.07	117.28
<b>TOTAL WORLD</b>							
1974/75	5.69	9.00	8.94	18.11	33.56	38.18	113.48
1975/76	5.60	9.57	9.18	18.92	29.96	39.32	112.55
1976/77	5.08	8.39	9.54	18.30	30.55	38.22	110.08
1977/78	5.82	9.38	11.19	18.09	33.13	43.49	121.09
1978/79	5.49	11.17	11.00	18.07	32.84	47.35	125.91
1979/80	5.58	11.62	12.47	18.00	32.27	51.48	131.41
1980/81	4.87	11.45	11.96	17.76	32.07	49.65	127.75
1981/82	4.62	12.13	12.72	18.55	32.95	50.07	131.03
1982/83	4.62	12.36	13.39	17.95	31.40	52.13	131.85
1983/84	4.38	12.77	13.27	17.79	30.99	50.80	129.99
1984/85	4.49	13.65	14.35	17.66	33.98	53.79	137.92
1985/86	4.49	14.72	15.81	17.84	31.73	52.07	136.66
1986/87	4.25	14.75	14.12	18.37	29.94	51.62	133.04
1987/88	4.02	16.69	15.24	18.16	31.47	54.15	139.72
1988/89	3.91	17.67	15.34	18.95	33.94	55.33	145.13

Table 11

## 1989/90 OILSEEDS AREA &amp; PRODUCTION BY REGION

AREA FORECAST (Million Hectares)	1988/89			1989/90			1988/89			1989/90		
	PALM OIL 1/	FLAXSEED	COPRA KERNEL	1/	RAPESEED	SUNFLOWER SEED	PEANUT	COTTON SEED	SOYBEAN	PEANUT	COTTON SEED	SOYBEAN
OTHER ASIA	1.33	10.14	2.69	12.19	15.98	12.51	54.84	54.37	54.37	12.51	54.84	54.37
UNITED STATES	0.09	—	0.72	0.67	4.25	24.36	29.62	23.99	29.62	18.12	30.09	29.62
SOUTH AMERICA	0.60	0.04	2.85	0.35	3.63	18.12	25.59	10.14	25.59	0.78	20.25	10.14
USSR	1.10	0.77	4.30	0.00	3.30	0.27	9.16	9.16	9.16	0.27	4.85	9.25
OTHER AFRICA	—	0.05	0.81	4.91	3.13	0.18	4.85	4.85	4.85	0.18	0.58	5.28
NORTH AMERICA	0.65	2.95	0.07	0.09	0.00	0.33	0.91	0.91	0.91	0.57	3.07	4.89
EUROPEAN COMMUNITY	0.09	1.56	2.09	0.00	0.04	0.17	2.26	2.26	2.26	0.17	1.54	2.17
EASTERN EUROPE	0.14	0.96	1.35	—	0.05	0.18	2.17	2.17	2.17	0.05	0.58	2.93
MIDDLE EAST	0.01	0.00	0.85	—	0.05	0.11	0.03	0.03	0.03	0.03	0.01	0.01
NORTH AFRICA	0.02	0.00	0.11	0.59	0.77	0.77	1.52	1.52	1.52	0.05	0.08	1.52
OCEANIA	0.01	0.06	0.19	0.03	0.22	0.22	0.52	0.52	0.52	0.01	0.34	0.52
OTHER WEST. EUROPE	—	0.31	—	—	—	—	0.11	0.11	0.11	0.01	0.12	0.32
CENTRAL AMERICA	—	—	—	—	0.02	0.02	0.04	0.04	0.04	0.01	0.11	0.11
CARIBBEAN	—	—	—	—	—	—	0.04	0.04	0.04	—	0.04	0.04
<b>TOTAL</b>	<b>4.05</b>	<b>16.82</b>	<b>16.04</b>	<b>18.88</b>	<b>33.15</b>	<b>58.43</b>	<b>147.38</b>	<b>145.13</b>	<b>145.13</b>	<b>147.38</b>	<b>145.13</b>	<b>147.38</b>
PRODUCTION FORECAST (Million Metric Tons)												
OTHER ASIA	7.72	0.40	2.22	4.02	9.46	2.27	15.28	14.26	14.26	16.10	64.01	62.57
UNITED STATES	—	0.09	—	—	—	1.05	2.04	4.45	4.45	53.07	60.69	50.07
SOUTH AMERICA	0.44	0.49	0.13	0.03	0.08	3.72	0.65	2.40	2.40	33.58	41.08	37.04
USSR	—	0.22	—	—	0.56	6.30	0.00	4.58	4.58	0.80	12.46	12.66
EUROPEAN COMMUNITY	—	0.08	—	—	4.55	3.40	0.01	0.49	0.49	1.80	10.32	11.25
NORTH AMERICA	0.00	0.75	0.00	0.14	3.70	0.08	0.10	0.33	0.33	1.95	7.05	6.90
OTHER AFRICA	1.36	—	0.66	0.19	0.02	0.59	3.63	1.61	1.61	0.34	7.03	6.92
EASTERN EUROPE	—	0.08	—	—	2.36	2.43	—	0.03	0.03	0.82	5.71	5.10
MIDDLE EAST	—	0.01	—	—	0.00	1.25	0.13	1.54	1.54	0.27	3.19	3.06
NORTH AFRICA	—	0.02	—	—	0.07	0.49	0.49	0.85	0.85	0.13	1.59	1.55
OCEANIA	0.18	0.01	0.07	0.29	0.07	0.20	0.05	0.44	0.44	0.14	1.26	1.15
OTHER WEST. EUROPE	—	—	—	—	0.00	0.59	0.07	—	—	0.03	0.69	0.58
CENTRAL AMERICA	0.13	—	—	0.01	0.03	—	—	—	—	0.16	0.02	0.16
CARIBBEAN	0.01	—	—	—	—	—	—	0.01	0.01	—	0.07	0.07
<b>TOTAL</b>	<b>9.84</b>	<b>2.14</b>	<b>3.08</b>	<b>4.70</b>	<b>21.39</b>	<b>21.47</b>	<b>22.38</b>	<b>31.13</b>	<b>31.13</b>	<b>109.06</b>	<b>215.35</b>	<b>199.09</b>

1/ No area data is estimated as production is based upon tree numbers of various producing ages.  
REGIONS INCLUDE:

OTHER ASIA: Afghanistan, Bangladesh, Burma, China, India, Indonesia, Cambodia, North Korea, South Korea, Laos.

SOUTH AMERICA: Argentina, Brazil, Bolivia, Chile, Colombia, Ecuador, Paraguay, Peru, Uruguay, Venezuela.

OTHER AFRICA: All African countries other than Egypt, Morocco, and the Sudan.

NORTH AMERICA: Canada, Mexico.

EUROPEAN COMMUNITY: Belgium, Luxembourg, Denmark, France, Federal Republic of Germany, Greece, Ireland, Italy, Netherlands, Portugal, Spain, United Kingdom.

EASTERN EUROPE: Albania, Bulgaria, Czechoslovakia, Germany, Democratic Republic, Hungary, Poland, Romania, Yugoslavia.

MIDDLE EAST: Iran, Iraq, Israel, Syria, Turkey, Yemen (Aden), Yemen (Sanaa).

NORTH AFRICA: Egypt, Morocco, Sudan.

OCEANIA: Australia, Fiji, Gilbert & Ellice Islands, New Caledonia, Papua New Guinea, Solomon Islands, Tonga, Vanuatu/New Hebrides, Western Samoa.

OTHER WESTERN EUROPE: Austria, Finland, Norway, Sweden, Switzerland.

CENTRAL AMERICA: Costa Rica, El Salvador, Guatemala, Honduras, Nicaragua.

CARIBBEAN: Cuba, Dominican Republic, Haiti, Jamaica, St. Lucia, St. Vincent & Grenadines, Trinidad & Tobago.

## EC-12 OILSEED PRODUCTION OUTLOOK

Total EC-12 oilseed production is projected to decline for the second year in a row after phenomenal growth throughout the early and mid-1980's. Oilseed production in EC-12 member countries rose from 3.2 million tons in 1980 to 12.2 million tons in 1987, but is forecast to decline to 10.3 million tons in the 1989 crop season. The increase in production throughout the early and mid-1980's can be attributed to both expanded area and higher yields, which have been driven largely by high producer prices under the Common Agricultural Policy (CAP). On the other hand, the smaller crop this year can be attributed to several factors, including 1) last year's low average rapeseed yields in France and the United Kingdom, which reduced gross returns to producers, 2) dry weather for fall and winter rapeseed plantings in France, 3) a forecast of near average sunflowerseed yields in Spain, and 4) lower sunflowerseed support prices in the EC-10 countries. Among the major oilseeds, rapeseed and sunflowerseed production are forecast to decline this year, while soybean production is expected to increase for the seventh consecutive year.

### Production Outlook for 1989/90

Rapeseed: EC-12 rapeseed production is forecast at 4.5 million tons, down 0.6 million or 12 percent from last year. Harvested area is estimated lower for France and the United Kingdom, but higher for Denmark and West Germany. Despite the decline in planted area this year, France remains the largest rapeseed producer in the EC with about 36 percent of the total rapeseed area. West Germany follows with about 27 percent, then the United Kingdom with 20 percent, and Denmark with 15 percent.

The most likely reasons for this year's area decline are the significant drop in average rapeseed yields last year in both France and the United Kingdom, and excellent fall harvest and planting weather which allowed farmers in these two countries enough time to sow a greater amount of winter wheat. In addition, fall and winter drought conditions in parts of France limited rapeseed sowings and hampered germination in areas where rapeseed was sown. Support prices actually rose last year, but this appears to have had little effect on plantings. It should be noted that last year's 3-percent increase in support prices over the previous year would not have occurred under the stabilizer mechanism used in 1987/88, when the guarantee threshold was set at 3.5 million tons (versus 4.5 million tons in 1988/89 and 1989/90) and prices were reduced by 1 percent for every percent of overproduction up to a 10 percent limit (versus 0.45 percent in 1988/89 and 0.5 percent in 1989/90). Using the current stabilizer formula and the USDA July rapeseed production estimate, support prices (on an ECU basis) are expected to increase by up to 8 percent this year.

Double-low varieties make up the bulk of the rapeseed sown in the EC, but there is still some discussion over implementation of the glucosinolate standard. Current EC regulations require that a crop must test below 35 micromoles of glucosinolate content per gram of air dried seed in order to qualify for the support price premium given to double-low varieties. During negotiations on the current EC-12 pricing package, the new standard of 20 micromoles was postponed until the 1991/92 marketing year due to the unavailability of winter varieties which can consistently meet the standard.

In addition, the proposal to offer price support to double-low varieties only was postponed until 1992/93, and both the EC Commission and the Agricultural Council made clear their intention to maintain aid for varieties containing erucic acid for industrial use. Among the major producers, all but France have converted almost totally to varieties which meet the 35 micromole standard. It is estimated that 65 percent of 1989/90 French plantings are double-low varieties, up from 19 percent in 1988/89, and that almost all plantings will be double-low varieties next year.

Rapeseed is primarily grown as a winter crop in the EC, and among the major producers only Denmark grows a significant amount of spring rapeseed. This puts the Danes in the enviable position of being able to assess winter plantings among competitors before making their own final planting decisions. As a result, they can better estimate the effects of the stabilizers on rapeseed prices. On the other hand, spring varieties generally yield lower, and average yields in Denmark are well below those in the other major producers.

TABLE 12  
EC-12 RAPESEED AREA AND YIELD COMPARISON

	--- 1989/90 Area Harvested --- ('000 Hectares)			Average Yield 1984-1988 (Tons/Hectare)
	Winter	Spring	Total	
Denmark	80	150	230	2.51
France	560	---	560	3.01
United Kingdom	300	5	305	3.21
West Germany	407	9	416	3.00

Sunflowerseed: EC-12 sunflowerseed production is forecast at 3.4 million tons, down 0.4 million tons or 11 percent from last year. Spain, the largest producer, increased planted area this year and it is estimated that it will account for over 50 percent of the total area planted to sunflowerseed in the EC. France is the second largest producer with an estimated 38 percent of total EC area.

Sunflowerseed plantings are estimated at 0.96 million hectares in the EC-10, down from 1.10 million last year. Most of that decline is likely due to an 11-percent drop in support prices from 1987/88 to 1988/89. For 1989/90, the guarantee threshold for the EC-10 is set at 2.0 million tons, the same level as in 1988/89. Production will probably exceed the threshold once again, but the stabilizer cuts will not be as deep and prices should rise from the 1988/89 level. In Spain, area increased this year in response to higher support prices and record yields in 1988. Spain is subject to an individual threshold of 1.4 million tons and is highly unlikely to exceed this limit.

Soybean: EC-12 soybean production is estimated at 1.8 million tons, up 0.1 million or 9 percent from last year. Area and production are expected to rebound from last year in northern Italy, where most of the EC soybean crop is grown. Soybeans compete primarily with corn, and producer prices are expected to favor soybean production this year despite the expected price cut. France, which produces most of the remaining soybeans, is expected to increase area for the seventh year in a row. Yields in France are trending sharply upward and high yields in 1988/89 coupled with relatively high prices have led to a 30-percent increase in soybean plantings. The guarantee threshold for the EC-12 is 1.3 million tons.

### CAP Production Policy

Under article 39 of the Treaty of Rome, the basic aims of the CAP are to increase agricultural productivity, support farmer income, stabilize agricultural markets, and ensure a regular supply of reasonably priced food to EC consumers. As agricultural expenditures have increased, however, budgetary controls became a major concern for several EC members, which is reflected in the changes made in price support policy such as the establishment of guarantee thresholds for grains and oilseeds.

The major price support tool for EC oilseeds is a subsidy paid to crushers or first purchasers, which is passed on to producers through high market prices. There is one basic policy regime which affects rapeseed and sunflowerseed production and another which deals with soybean production. Production policy is identical for the EC-10 countries, and the policy mechanisms in Spain and Portugal are similar to those for the EC-10.

Three basic price levels affect producer returns under the rapeseed and sunflowerseed regime. The most important of these is the target price, which is set annually. The subsidy paid to EC oilseed crushers is equal to the difference between the target price and the EC-calculated world market price. This subsidy allows crushers to purchase EC-produced oilseeds at or near the target price level. Estimated world market prices are set at least once a week and are often posted daily when oilseed prices are moving rapidly. An intervention price, intended to be a price floor, is also announced on an annual basis, but few oilseeds go into intervention. EC producers generally receive a price that is somewhere between the target and intervention prices, adjusted for quality and transportation costs. Both target and intervention prices are subject to monthly increases to account for storage costs and interest charges.

Member states of the EC are required to purchase oilseeds offered into intervention during a specified time period. In the northern countries, the intervention period is from November 1 to May 31, and in Italy, Greece, Spain, and Portugal, the intervention period is from August 1 to April 30. Intervention purchases of rapeseed are limited to seeds which are low in erucic acid (less than 5 percent), and a premium of 25 ECU per ton is available for seed low in both erucic acid and glucosinolates (double-low varieties).

Soybeans are covered by a separate price regime. Guide prices are set on the same basis as target prices for the other oilseeds, and a subsidy equivalent to the difference between the guide price and the EC calculated world market price is paid to the first purchaser of EC soybeans. There is no intervention mechanism for soybeans, but purchasers must document that they have paid producers at or above a set minimum price in order to claim the subsidy. Announced guide and minimum prices are based on a standard quality.

Support prices for the major oilseeds are affected by guarantee thresholds. When production exceeds the threshold for a given commodity, prices are reduced in the current marketing year by a portion of the percentage by which production exceeds the threshold. Guarantee thresholds are set for the EC-10 as a whole, and for Spain and Portugal individually. For 1989/90, target and intervention prices will be reduced by 0.50 percent for each 1.0 percent of overproduction of rapeseed and sunflowerseed in the EC-10. Individual thresholds are set for Spain and Portugal, but it is highly unlikely that they will be exceeded.

Announced oilseed support levels (in ECU) for the EC-10 have remained stable since 1987/88, but implementation of the guarantee thresholds has had a variable effect on the prices received. In addition, the use of "green rates" distorts the actual value of agricultural support. Green rates are artificial exchange rates used for determining the local support prices which correspond to the Community-wide support prices announced on an ECU basis. For example, the target price for rapeseed was set at 407.6 ECU's per ton, or US\$390 per ton, during this year's pricing package negotiations. According to the U.S. agricultural attache in Copenhagen, however, the local target price in Denmark is 3,267.4 kroner per ton, or US\$423 per ton. (Based on spot exchange rates, Financial Times, June 20, 1989).

TABLE 13  
EC-12 GREEN RATES VERSUS EXCHANGE RATES  
(Local Currency per ECU)

	----Green Rates----	-Exchange-	Percent
	1988/89	1989/90	Difference
		6/20/89	
Bel./Lux.	48.287	48.287	11
Denmark	8.842	8.930	11
France	7.584	7.698	10
Greece	156.020	179.387	1
Ireland	0.844	0.857	10
Italy	1,635.000	1,673.000	11
Netherlands	2.647	2.638	13
Portugal	188.007	192.002	N/A
Spain	154.213	152.896	16
United Kingdom	0.675	0.701	4
West Germany	2.361	2.361	14

1/ Exchange rates are based on spot rates as quoted in the Financial Times, 6/20/89.

**TABLE 14**  
**EC OILSEED PRICE REGIMES**

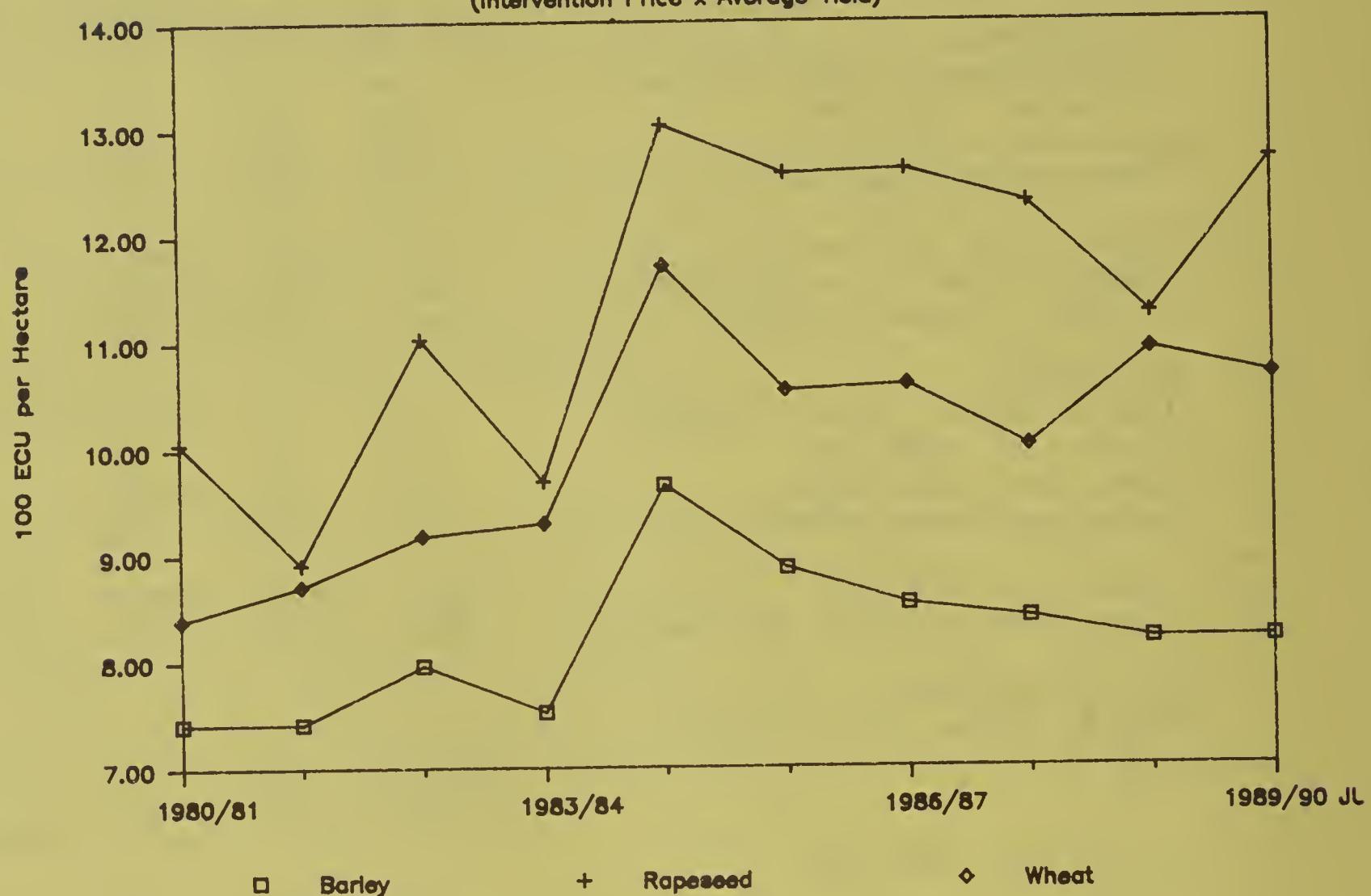
	<u>1987/88</u>	<u>1988/89</u>	<u>1989/90</u>
<b>EC RAPESEED</b>			
Area Harvested - USDA ('000 Ha.)	1.9	1.8	1.6
Production - USDA (MMT)	5.9	5.2	4.5
Production - EC (MMT)	5.9	5.3	N/A
Guarantee Threshold (MMT)	3.5	4.5	4.5
Target Price (ECU/Ton)	450.2	450.2	450.2
Adjusted Target Price (ECU/Ton) <u>1/</u>	405.2	415.8	448.3
Monthly Increment (ECU/Ton)	3.97	3.18	2.78
<b>EC SOYBEANS</b>			
Area Harvested - USDA ('000 Ha.)	0.6	0.5	0.6
Production - USDA (MMT)	1.8	1.6	1.8
Production - EC (MMT)	1.8	1.6	N/A
Guarantee Threshold (MMT)	1.1	1.3	1.3
Guide Price (ECU/Ton)	558.5	558.5	558.5
Adjusted Target Price (ECU/Ton) <u>1/</u>	502.7	500.7	451.3
<b>EC SUNFLOWERSEED</b>			
Area Harvested - USDA ('000 Ha.)			
EC-10	1.2	1.1	1.0
Spain	1.0	0.9	1.1
Production - USDA (MMT)			
EC-10	2.9	2.6	2.3
Spain	1.0	1.1	1.1
Production - EC (MMT)			
EC-10	2.9	2.8	N/A
Spain	1.0	1.3	N/A
Guarantee Threshold (MMT)			
EC-10	1.7	2.0	2.0
Spain	1.2	1.4	1.4
Target Price (ECU/Ton)			
EC-10	583.5	583.5	583.5
Spain	445.5	462.8	480.0
Adjusted Target Price (ECU/Ton) <u>1/</u>			
EC-10	525.5	468.0	544.8
Spain	445.5	462.8	480.0
Monthly Increment (ECU/Ton)	4.7	3.8	3.3

1/ Adjusted target prices are calculated using USDA 1989/90 July production estimates.

Chart 1

## EC: GROSS RETURNS FOR COMPETING CROPS

(Intervention Price x Average Yield)



## NOTES:

1/ For EC-10 countries only.

2/ Intervention prices used for wheat are for bread wheat.

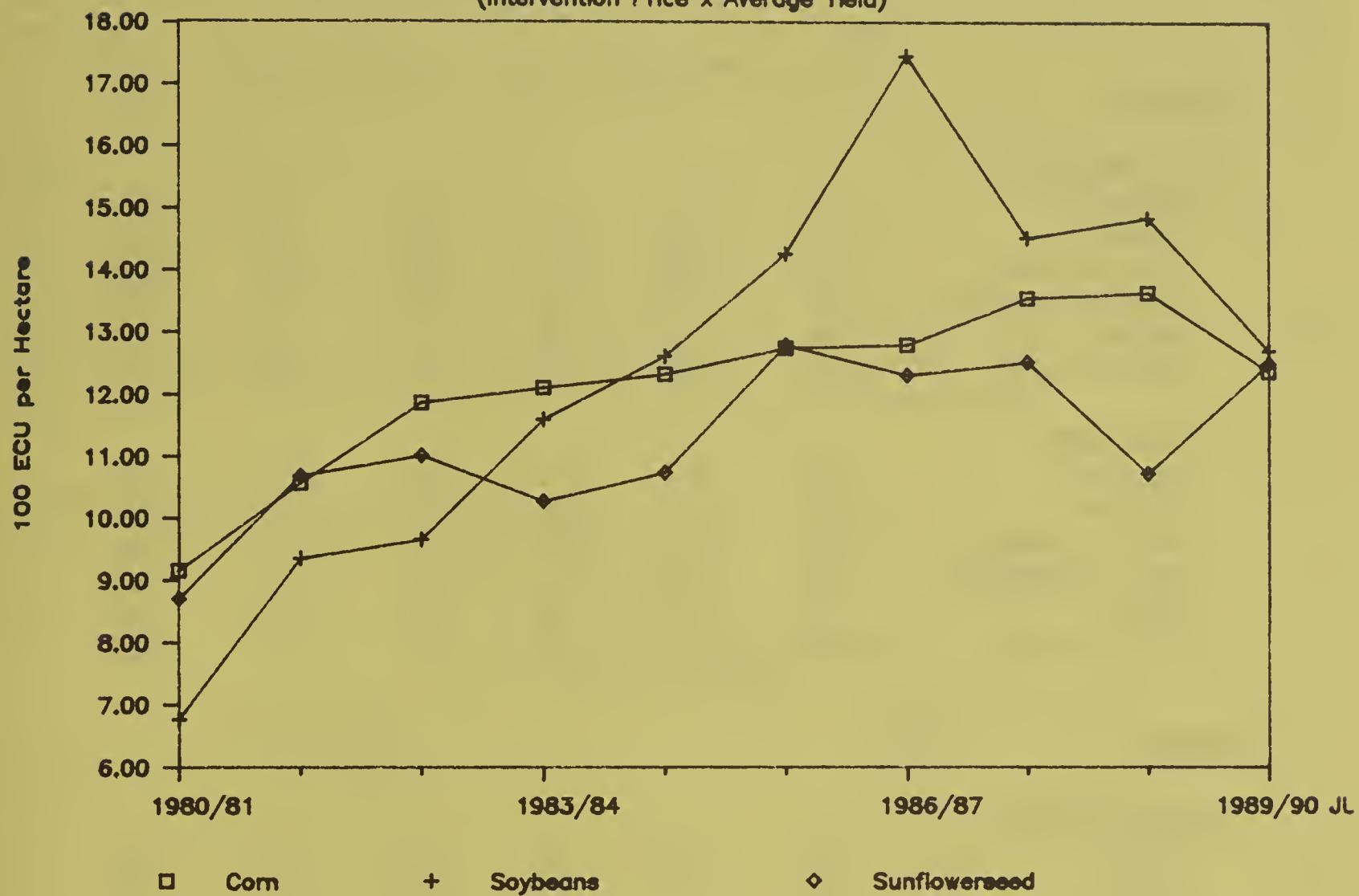
3/ Intervention prices were adjusted to reflect reductions caused by guarantee thresholds, co-responsibility and supplemental co-responsibility levies for grains, and the 94% buy-in regulation.

4/ Intervention prices have also been adjusted for the appreciation of the green ECU. Since the value of the green ECU has been tied to the value of the West German Mark, it has increased steadily in value and the result has been an equivalent increase in support prices in national currency terms. The coefficients used to convert the agricultural central rate (used to convert the ECU to local currencies for agricultural products) to the market central rate are as follows: 1984/85 &amp; 1985/86 - 1.035, 1986/87 - 1.0836, 1987/88 - 1.1256, 1988/89 &amp; 1989/90 - 1.1372.

Chart 1 (Continued)

## EC: GROSS RETURNS FOR COMPETING CROPS

(Intervention Price x Average Yield)



### NOTES (continued):

5/ Intervention prices and adjustment calculations for 1980/81 - 1988/89 were obtained from Western Europe and Inter-America Division, International Trade Policy, FAS/USDA. Calculations for 1989/90 projections are based on USDA July production estimates.

Table 15

**EC-12 OILSEED PRODUCTION FORECASTS FOR 1989/90**  
**(In thousand hectares and thousand metric tons)**

1984/85 1985/86 1986/87 1987/88 1988/89 1989/90

**RAPESEED**

**AREA HARVESTED**

Denmark	191	217	227	250	199	230
France	430	461	388	740	869	560
West Germany	254	266	308	428	385	420
United Kingdom	269	296	299	388	340	305
Other	34	31	48	55	47	42
<b>EC-12 Total</b>	<b>1,178</b>	<b>1,271</b>	<b>1,270</b>	<b>1,861</b>	<b>1,840</b>	<b>1,557</b>

**PRODUCTION**

Denmark	474	544	618	556	528	600
France	1,304	1,340	1,071	2,645	2,320	1,600
West Germany	662	803	969	1,265	1,216	1,300
United Kingdom	925	895	940	1,353	1,000	950
Other	74	66	98	133	113	99
<b>EC-12 Total</b>	<b>3,439</b>	<b>3,648</b>	<b>3,696</b>	<b>5,952</b>	<b>5,177</b>	<b>4,549</b>

**SOYBEAN****AREA HARVESTED**

France	22	28	48	79	92	120
Italy	36	94	232	481	415	450
Other	2	2	2	4	10	11
<b>EC-12 Total</b>	<b>60</b>	<b>124</b>	<b>282</b>	<b>564</b>	<b>517</b>	<b>581</b>

**PRODUCTION**

France	31	46	85	186	243	280
Italy	110	286	806	1,589	1,393	1,500
Other	4	5	5	8	18	9
<b>EC-12 Total</b>	<b>145</b>	<b>337</b>	<b>896</b>	<b>1,783</b>	<b>1,654</b>	<b>1,799</b>

**SUNFLOWERSEED****AREA HARVESTED**

France	476	591	849	965	912	800
Spain	1,007	1,215	1,070	994	921	1,075
Other	163	214	229	249	235	210
<b>EC-12 Total</b>	<b>1,646</b>	<b>2,020</b>	<b>2,148</b>	<b>2,208</b>	<b>2,068</b>	<b>2,085</b>

**PRODUCTION**

France	958	1,477	1,902	2,508	2,250	1,900
Spain	1,100	990	920	1,006	1,123	1,100
Other	241	354	456	432	438	400
<b>EC-12 Total</b>	<b>2,299</b>	<b>2,821</b>	<b>3,278</b>	<b>3,946</b>	<b>3,811</b>	<b>3,400</b>

## FOREST PRODUCTS SITUATION IN HONDURAS

Forests cover approximately 50 percent of the total Honduran land mass. Pine species constitute about 60 percent of the forested area. The remaining 40 percent is comprised of colored woods such as mahogany and cedar. The annual cut totals roughly 950,000 cubic meters and is harvested primarily during the dry season (December/May). Reforestation efforts are minimal and virtually all supplies are cut from natural stands. Harvesting equipment is relatively modern, but obsolete machinery in the sawmills limits the utilization rate from standing timber to less than 50 percent. To date, industry expansion has been inhibited by declining area, forest fires, poor management, difficult topography, inaccessibility, poor drying techniques, and financial constraints. A joint agreement between the U.S. Agency for International Development and the Honduran Government seeks to remedy many of these problems by pumping \$20 million into the industry for improvements in forest management, productivity, milling efficiency, and marketing.

Bernadine Baker (202) 382-8891

TABLE 16

<u>HONDURAS: LAND USE</u>	
(1,000 Hectares)	
Softwoods	2,400
Hardwoods	2,931
Deforested Area	2,326
 Total Forest Area	7,657
 Agricultural, Range, and Urban Zones	3,552
 TOTAL AREA	11,209

<u>SAWNWOOD PRODUCTION</u> (1,000 Cubic Meters)			<u>PLYWOOD PRODUCTION</u> (1,000 Cubic Meters)
<u>Coniferous</u>	<u>Non-Coniferous</u>	<u>Total</u>	<u>1/4-Inch Thickness</u>
1977	608	13	621
1978	616	11	627
1979	567	8	575
1980	546	11	557
1981	543	8	551
1982	476	2	478
1983	453	3	456
1984	411	3	414
1985	421	3	424
1986	388	2	390
1987	442	3	445
1988	417	2	419

## RAPID GROWTH IN SOUTH KOREA'S DAIRY SECTOR

Korea's milk production exceeded 1.6 million tons in 1988, over 20 percent above 1987 and 10 times the 1975 level, according to a report from the U.S. agricultural counselor in Seoul. This sustained rapid growth has been driven by strong demand as incomes have improved and the Korean populace has developed a taste for dairy products. In the early years, the government encouraged meeting demand by importing highly productive dairy animals mainly from the United States and Canada, but lately it has been more restrictive as to what is imported.

Korea has limited pasture and forage resources which require milk producers to find alternative sources for their feed supply. In the early years of dairy development, efforts were made to use farm by-products as feed because the commercial mixed feed industry was not well developed. As the mixed feed industry added capacity and became more sophisticated, farmers generally switched to commercially mixed feeds. Prices for commercial dairy feeds largely depend on international grain and oilseed markets because most feed ingredients are imported. Producer milk prices, which are set by the government, were raised 13 percent in April 1989 to offset rising feed prices.

Consumption of milk and other dairy products is growing rapidly in South Korea and since imports are restricted, rising consumption is one of the major forces behind the rapid production growth. Most milk is consumed as fresh milk, but consumption of yogurt also is growing rapidly. Annual consumption of various forms of dry milk have been just over 40,000 tons (product weight) in recent years and have shown moderate growth. Cheese consumption has more than doubled in each of the last 2 years, but was still only 3,165 tons in 1988. Growth in butter consumption has been more moderate in recent years with total consumption of 3,893 tons reported for 1988.

The development of Korea's modern dairy industry started with the importation of 2,000 Holstein heifers from the United States and Canada in 1962. With subsequent imports and reproduction from the imported stock, the dairy herd developed rapidly. The number of dairy animals expanded rapidly in the early years, but so did the number of participating farmers. Although dairy cattle numbers have continued to grow in recent years, dairy farm numbers peaked in 1986 and have gone down every year since. Per farm herd size is still small, but has been growing rapidly since 1986. Of the approximately 36,000 dairy farms reported in 1989, 70 percent had less than 15 dairy cattle, while only 7 percent had more than 30 animals. Most milking is done mechanically with 90 percent of the operations using a bucket system. Most of the rest (usually operations with more than 20 cows) use a pipeline system.

Prior to 1985, most of the improvement in the dairy herd was obtained by imports of breeding animals with a total of 75,000 imported between 1978 and 1985. Since 1985, live animal imports have been restricted to only a few bulls per year. Current policy allows semen imports, but only when the Korean Livestock Improvement Association judges the quality of such imports to be superior to that of domestic bulls.

Table 17

KOREA: MILK PRODUCTION, COW NUMBERS, AND PRODUCTION OF DAIRY FEEDS

<u>Year</u>	<u>Milk Production</u> (1,000 tons)	<u>Cow Numbers</u> (1,000 head)	<u>Dairy Feed Production</u> (1,000 tons)
1975	160	N/A	N/A
1980	452	89	514
1985	1,006	195	994
1986	1,154	231	1,208
1987	1,338	249	1,404
1988	1,632	267	1,608

Table 18

KOREA: DEVELOPMENT OF THE NATIONAL DAIRY HERD

<u>Year</u>	<u>Dairy Animals</u>		<u>Dairy Farms</u>	<u>Animals per farm</u>	
	<u>Total</u> (1,000 head)	<u>Cows</u>	(1,000)	<u>Total</u>	<u>Cows</u>
				<u>-----head-----</u>	
1965	5	N/A	1.1	4.8	N/A
1970	19	N/A	2.3	8.1	N/A
1975	73	N/A	7.4	9.9	N/A
1980	163	89	17.2	9.5	5.2
1985	334	195	37.6	8.9	5.2
1986	390	231	43.8	8.9	5.3
1987	437	249	42.7	10.3	5.8
1988	463	267	38.1	12.2	7.0
1989	480	276	35.7	13.4	7.7

All data are from the March census of the year shown.

## WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World total unmanufactured tobacco production for 1989 is estimated at 7.20 million tons compared to 6.71 million tons produced in 1988. Both totals are slightly below the June estimates due to downward revisions for Poland and Malawi. Larger crops are forecast for all leaf types except light air-cured and dark fire-cured.

Flue-cured tobacco production for 1989 is projected at 4.31 million tons, up 10 percent from last year. Production is expected to be up in all the major producing countries: China, up 12 percent; the United States, up 7 percent; India, up 69 percent; Brazil, up 4 percent; and Zimbabwe, up 7 percent. Production expansion is expected to be less this year than the 20-percent gain last year because of slower growth in China.

Burley tobacco production for 1989 is projected at 0.72 million tons, up 10 percent, as plantings are up sharply in both the United States and Malawi. This is partly offset by expectations of a 30 percent smaller crop in Mexico because of a shortage of state credit for producers.

Oriental tobacco production, which is projected up about 3 percent to 0.80 million tons, is still down substantially from the 1987 harvest because of reduced Soviet production. Turkey, the second largest producer, is projected to harvest a 12 percent smaller crop than in 1988. Delayed payments to farmers for last year's crop and dry soils at planting time are two factors that reportedly caused farmers to cut plantings 16 percent. Bulgarian production is projected up 22 percent from the drought-reduced 1988 harvest. Greek production is forecast up 11 percent due to increased plantings because of higher EC support prices.

Dark air/sun-cured tobacco production for 1989 is projected up 2 percent to 1.01 million tons. The increase is attributed largely to a 15-percent increase in India's crop which is recovering from last year's drought and some recovery from drought in northern Brazil. This is partly offset by reduced production in Indonesia, Argentina, China, and Italy. Poland's crop is now projected down nearly one-third from the earlier forecast because of reported reductions in plant density per hectare in order to improve crop quality.

---

Arthur Hausmann (202) 382-8883

Table 19

**TOTAL UNMANUFACTURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
---HECTARES---				---METRIC TONS---		
<b>NORTH AMERICA</b>						
Canada	26,471	30,585	32,530	60,850	71,255	78,125
Mexico	47,443	44,895	33,044	48,720	75,120	57,750
United States	237,616	257,017	284,864	540,090	621,701	697,501
REGION TOTAL	311,530	332,497	350,438	649,660	768,076	833,376
<b>SOUTH AMERICA</b>						
Argentina	53,100	55,233	52,277	70,231	72,235	75,600
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	286,000	267,000	285,000	410,000	419,000	440,000
Chile	2,613	3,024	3,438	8,825	9,969	11,511
Colombia	21,499	20,873	22,094	31,637	31,995	33,203
Ecuador	1,800	1,800	1,800	3,850	3,850	3,850
Guyana	100	100	100	100	100	100
Paraguay	9,302	6,200	6,200	12,000	7,378	7,378
Peru	2,500	2,500	2,500	3,100	3,100	3,100
Uruguay	800	800	800	1,400	1,400	1,400
Venezuela	8,014	8,799	8,461	13,300	14,528	14,200
REGION TOTAL	386,978	367,579	383,920	555,693	564,805	591,592
<b>CENTRAL AMERICA</b>						
Costa Rica	926	800	910	1,703	1,643	1,571
El Salvador	500	620	624	1,394	1,408	1,531
Guatemala	4,370	5,184	6,059	7,303	8,950	10,493
Honduras	2,372	2,340	2,534	3,963	3,775	4,600
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550
Panama	720	720	720	1,302	1,302	1,302
REGION TOTAL	11,128	11,904	13,087	20,215	21,628	24,047
<b>CARIBBEAN</b>						
Cuba	55,000	55,000	55,000	43,000	44,000	44,000
Dominican Rep.	22,798	22,827	25,674	31,656	24,908	28,628
Haiti	565	565	565	730	730	730
Jamaica & dep.	1,175	1,175	1,175	2,339	2,339	2,339
Trin. and Tobago	100	100	100	170	170	170
REGION TOTAL	79,638	79,667	82,514	77,895	72,147	75,867
<b>NORTH AFRICA</b>						
Algeria	6,000	4,000	4,000	6,000	5,500	5,500
Libya	900	900	900	1,450	1,450	1,450
Morocco	3,357	4,767	5,800	4,686	6,437	7,685
Tunisia	4,450	5,400	5,410	5,040	5,500	5,600
REGION TOTAL	14,707	15,067	16,110	17,176	18,887	20,235

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
JULY 1989

Table 19 (Continued)

**TOTAL UNMANUFACTURED TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
<b>OTHER AFRICA</b>						
Angola	3,950	3,950	3,950	3,900	3,900	3,900
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Cameroon	2,300	2,300	2,300	2,480	2,400	2,400
Congo	4,100	4,100	4,100	1,800	1,800	1,800
Ghana	1,800	1,825	1,825	1,246	1,166	1,200
Cote D'Ivoire	9,450	9,450	9,450	2,300	2,500	2,500
Kenya	4,830	4,830	4,860	6,995	8,262	8,850
Liberia	10	10	10	10	10	10
Madagascar	5,900	5,900	5,900	5,300	5,300	5,300
Malawi	89,250	90,050	100,720	75,758	75,053	86,020
Mauritius	600	633	650	1,049	1,003	1,050
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900
Nigeria	8,198	8,198	8,198	7,642	8,075	8,075
Sierra Leone	540	540	540	580	580	580
South Africa	26,083	24,936	25,699	27,780	31,957	35,345
Tanzania	24,618	21,250	21,250	17,355	17,055	17,055
Uganda	4,300	4,300	4,300	1,100	1,100	1,100
Zaire	3,700	3,700	3,700	4,110	4,110	4,110
Zambia	3,500	3,500	3,500	3,750	4,300	4,300
Zimbabwe	65,670	61,864	62,490	131,483	123,631	132,512
REGION TOTAL	263,499	256,036	268,142	299,138	296,702	320,607
<b>OTHER ASIA</b>						
Bangladesh	54,000	54,000	54,000	51,545	51,545	51,545
Burma	46,000	55,000	55,000	40,000	45,000	45,000
China	1,128,500	1,507,200	1,743,550	1,943,000	2,620,000	2,886,161
India	383,800	323,955	364,665	459,100	358,930	445,150
Indonesia	279,358	287,012	265,020	154,020	159,011	155,520
Japan	42,327	40,557	30,662	94,400	85,790	71,000
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000
Korea, South	35,274	31,821	31,014	78,039	72,998	70,300
Laos	4,000	4,000	4,000	3,000	3,000	3,000
Malaysia	12,664	9,887	12,740	11,388	7,872	11,865
Pakistan	38,996	41,599	35,480	69,200	69,530	61,880
Philippines	47,898	52,142	51,050	79,417	70,434	79,150
Singapore	30	30	30	50	50	50
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000
Taiwan	9,070	8,423	8,150	24,005	20,766	20,110
Thailand	59,141	53,518	52,490	67,087	54,228	59,379
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000
REGION TOTAL	2,231,223	2,559,309	2,798,016	3,162,251	3,707,154	4,048,110

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 19 (Continued)

**TOTAL UNMANUFACTURED TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>MIDDLE EAST</b>						
Cyprus	161	161	161	241	241	241
Iran	18,000	18,000	18,000	25,000	25,000	25,000
Iraq	10,000	10,000	12,000	9,000	10,000	12,000
Israel	600	800	600	370	295	350
Jordan	2,850	2,850	2,850	2,800	2,800	2,800
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	15,117	14,355	14,550	16,719	16,054	16,750
Turkey	202,805	261,710	220,590	184,712	211,128	186,078
Yemen (Sanaa)	3,105	3,322	3,300	4,772	5,106	5,200
REGION TOTAL	256,388	314,948	275,801	248,614	275,624	253,419
<b>EUROPEAN COMMUNITY</b>						
Belgium-Lux.	384	426	425	1,079	1,586	1,582
France	14,349	12,669	13,000	33,923	29,357	31,216
Germany, West	3,206	3,140	3,050	6,174	7,450	7,250
Greece	92,017	87,006	91,760	144,045	134,795	150,288
Italy	77,451	88,000	85,000	162,127	186,900	177,000
Portugal	2,001	2,123	2,316	3,900	4,151	4,301
Spain	24,691	24,400	25,000	36,210	34,325	40,145
REGION TOTAL	214,099	217,764	220,551	387,458	398,564	411,782
<b>OTHER WEST EUROPE</b>						
Austria	264	259	256	416	457	435
Switzerland	712	699	690	1,306	1,550	1,450
REGION TOTAL	976	958	946	1,722	2,007	1,885
<b>EAST EUROPE</b>						
Albania	24,000	24,000	24,000	16,000	15,000	15,000
Bulgaria	90,468	91,000	92,000	132,374	110,200	128,000
Czechoslovakia	3,756	3,750	3,750	5,500	5,500	5,500
Germany, East	3,800	3,648	3,716	6,450	5,900	6,200
Hungary	10,700	10,900	11,000	21,903	22,800	23,480
Poland	48,426	41,772	45,700	116,100	89,420	80,300
Romania	34,450	34,500	34,400	28,900	26,900	30,300
Yugoslavia	61,000	52,000	58,750	72,000	51,000	72,000
Region Total	276,600	261,570	273,316	399,227	326,720	360,780
<b>USSR</b>	161,000	132,000	132,000	296,000	242,000	242,000
<b>OCEANIA</b>						
Australia	5,500	5,015	5,300	13,400	13,335	13,500
New Zealand	620	620	620	1,580	1,580	1,580
REGION TOTAL	6,120	5,635	5,920	14,980	14,915	15,080
<b>WORLD</b>	4,213,886	4,554,934	4,820,761	6,130,029	6,709,229	7,198,780

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 20

**FLUE CURED TOBACCO**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
	HECTARES			METRIC TONS		
<b>NORTH AMERICA</b>						
Canada	26,000	30,000	32,000	59,900	70,000	77,000
Mexico	10,685	7,290	7,012	15,890	13,820	12,010
United States	131,366	148,282	163,094	313,399	368,872	395,176
REGION TOTAL	168,051	185,572	202,106	389,189	452,692	484,186
<b>SOUTH AMERICA</b>						
Argentina	28,500	28,800	29,200	43,964	42,053	44,500
Brazil	162,000	144,000	160,000	263,000	281,000	292,000
Chile	809	946	1,102	2,352	2,620	3,220
Colombia	4,478	3,051	3,764	6,561	5,063	5,787
Ecuador	650	650	650	1,575	1,575	1,575
Guyana	100	100	100	100	100	100
Peru	1,200	1,200	1,200	1,820	1,820	1,820
Uruguay	665	665	665	1,250	1,250	1,250
Venezuela	5,179	5,438	5,485	8,100	8,806	9,242
REGION TOTAL	203,581	184,850	202,166	328,722	344,287	359,494
<b>CENTRAL AMERICA</b>						
Costa Rica	312	233	274	600	529	490
El Salvador	291	350	375	888	791	874
Guatemala	674	545	832	1,208	851	1,392
Honduras	694	325	556	1,377	766	1,173
Nicaragua	500	500	500	1,000	1,000	1,000
Panama	100	100	100	180	180	180
REGION TOTAL	2,571	2,053	2,637	5,253	4,117	5,109
<b>CARIBBEAN</b>						
Cuba	5,500	5,500	5,500	6,000	6,000	6,000
Dominican Rep.	1,171	1,258	1,445	2,323	1,594	1,820
Haiti	145	145	145	140	140	140
Jamaica and dep.	547	547	547	1,212	1,212	1,212
Trin. and Tobago	100	100	100	170	170	170
REGION TOTAL	7,463	7,550	7,737	9,845	9,116	9,342

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 20 (Continued)

**FLUE CURED TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
	HECTARES			METRIC TONS		
<b>OTHER AFRICA</b>						
Angola	3,200	3,200	3,200	3,200	3,200	3,200
Ghana	1,550	1,825	1,825	985	1,166	1,200
Kenya	3,800	3,800	3,800	5,212	6,165	6,300
Madagascar	750	750	750	1,000	1,000	1,000
Malawi	15,500	16,800	16,800	24,463	20,742	22,500
Mauritius	550	600	600	1,000	950	1,000
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350
Nigeria	1,934	1,934	1,934	2,128	1,955	1,955
Sierra Leone	342	342	342	365	365	365
South Africa	20,924	21,087	21,502	22,860	27,742	29,780
Tanzania	18,218	18,218	18,218	15,000	15,000	15,000
Uganda	1,600	1,600	1,600	400	400	400
Zaire	880	880	880	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,150	3,500	3,500
Zimbabwe	63,536	59,471	59,800	127,996	119,875	128,000
REGION TOTAL	136,904	134,627	135,371	210,509	204,810	216,950
<b>OTHER ASIA</b>						
Bangladesh	12,000	12,000	12,000	13,000	13,000	13,000
Burma	5,800	5,800	5,800	13,200	13,200	13,200
China	913,000	1,290,000	1,530,000	1,636,000	2,330,000	2,600,000
India	105,600	68,400	97,800	112,500	59,700	95,600
Indonesia	85,914	82,000	80,000	58,400	55,000	57,000
Japan	24,647	24,004	19,752	62,683	52,670	46,700
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Korea, South	25,008	22,952	22,360	57,100	52,196	50,300
Laos	1,150	1,150	1,150	1,025	1,025	1,025
Malaysia	12,314	9,477	12,300	10,848	7,252	11,200
Pakistan	12,167	11,871	11,415	25,800	24,800	24,000
Philippines	25,700	26,000	25,000	42,800	30,720	40,000
Singapore	30	30	30	50	50	50
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909
Taiwan	9,070	8,423	8,150	24,005	20,766	20,110
Thailand	25,566	21,516	20,340	30,823	22,692	25,000
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800
REGION TOTAL	1,293,783	1,619,440	1,881,914	2,122,543	2,717,380	3,031,494

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 20 (Continued)

**FLUE CURED TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>MIDDLE EAST</b>						
Cyprus	144	144	144	230	230	230
Iran	2,750	2,750	2,750	5,300	5,300	5,300
Jordan	2,650	2,650	2,650	2,760	2,760	2,760
Syria	2,127	1,815	2,000	4,202	4,010	3,900
Turkey	650	525	500	1,300	1,000	950
Yemen (Sanaa)	3,105	3,322	3,300	4,772	5,106	5,200
REGION TOTAL	11,426	11,206	11,344	18,564	18,406	18,340
<b>EUROPEAN COMMUNITY</b>						
France	3,440	3,013	3,300	5,785	5,570	6,316
Germany, West	572	600	600	834	1,250	1,250
Greece	663	1,574	2,260	1,690	4,525	6,500
Italy	18,496	19,300	18,500	40,803	42,400	40,000
Portugal	1,386	1,419	1,626	2,550	2,623	3,011
Spain	7,007	7,500	8,000	10,842	10,940	14,000
REGION TOTAL	31,564	33,406	34,286	62,504	67,308	71,077
<b>EAST EUROPE</b>						
Bulgaria	10,602	12,000	11,500	18,718	18,500	17,000
Czechoslovakia	1,100	1,100	1,100	1,200	1,200	1,200
Germany, East	1,710	1,146	1,181	3,074	1,893	2,030
Hungary	6,280	6,500	7,000	10,800	11,290	12,710
Poland	19,075	17,009	20,000	40,670	31,785	33,000
Romania	6,800	7,000	7,100	5,800	5,000	6,000
Yugoslavia	20,000	18,000	19,250	26,000	20,000	25,000
REGION TOTAL	65,567	62,755	67,131	106,262	89,668	96,940
<b>USSR</b>	1,000	1,000	1,000	2,000	2,000	2,000
<b>OCEANIA</b>						
Australia	5,500	5,015	5,300	13,400	13,335	13,500
New Zealand	603	603	603	1,550	1,550	1,550
REGION TOTAL	6,103	5,618	5,903	14,950	14,885	15,050
<b>WORLD TOTAL</b>	<b>1,928,013</b>	<b>2,248,077</b>	<b>2,551,595</b>	<b>3,270,341</b>	<b>3,924,669</b>	<b>4,309,982</b>

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 21

**BURLEY TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>NORTH AMERICA</b>						
Canada	81	0	0	180	0	0
Mexico	21,684	20,922	13,584	14,390	33,770	23,650
United States	87,334	91,584	103,320	190,222	216,456	264,449
REGION TOTAL	109,099	112,506	116,904	204,792	250,226	288,099
<b>SOUTH AMERICA</b>						
Argentina	12,000	12,800	11,500	16,699	14,795	20,000
Brazil	34,000	33,000	35,000	52,000	54,000	55,000
Chile	1,651	1,928	2,154	6,040	6,923	7,849
Colombia	2,046	1,863	1,987	2,698	3,033	3,082
Ecuador	700	700	700	1,700	1,700	1,700
Paraguay	450	980	980	582	1,500	1,500
Peru	400	400	400	380	380	380
Uruguay	65	65	65	50	50	50
Venezuela	2,835	3,361	2,976	5,200	5,722	4,958
REGION TOTAL	54,147	55,097	55,762	85,349	88,103	94,519
<b>CENTRAL AMERICA</b>						
Costa Rica	129	134	175	243	201	268
El Salvador	174	270	249	421	617	657
Guatemala	3,377	4,349	4,955	5,555	7,837	8,712
Honduras	1,126	1,177	1,332	1,897	1,531	1,980
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300
Panama	380	380	380	1,000	1,000	1,000
REGION TOTAL	6,336	7,460	8,241	11,416	13,486	14,917
<b>CARIBBEAN</b>						
Dominican Rep.	561	648	959	845	816	1,208
Haiti	320	320	320	390	390	390
REGION TOTAL	881	968	1,279	1,235	1,206	1,598
<b>NORTH AFRICA</b>						
Libya	300	300	300	715	715	715
Morocco	3,220	4,660	5,660	4,135	5,964	7,200
Tunisia	4,000	4,900	4,910	3,955	4,460	4,470
REGION TOTAL	7,520	9,860	10,870	8,805	11,139	12,385

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
JULY 1989

Table 21 (Continued)

**BURLEY TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
OTHER AFRICA						
Angola	250	250	250	200	200	200
Kenya	30	30	60	126	147	250
Madagascar	2,150	2,150	2,150	1,545	1,545	1,545
Malawi	30,500	41,400	52,000	36,789	45,603	55,000
Mozambique	950	950	950	1,150	1,150	1,150
South Africa	739	222	295	750	163	340
Tanzania	200	200	200	55	55	55
Zaire	650	650	650	660	660	660
Zambia	650	650	650	600	800	800
Zimbabwe	1,984	2,253	2,650	3,464	3,734	4,500
REGION TOTAL	38,103	48,755	59,855	45,339	54,057	64,500
OTHER ASIA						
Bangladesh	350	350	350	280	280	280
China	21,000	22,700	24,000	39,000	42,000	43,055
India	1,780	2,330	2,865	1,000	1,330	1,550
Indonesia	11	12	20	10	11	20
Japan	8,108	13,108	8,897	10,512	23,520	19,200
Korea, South	10,266	8,869	8,654	20,939	20,802	20,000
Malaysia	350	410	440	540	620	665
Pakistan	370	203	335	700	400	680
Philippines	9,852	10,000	9,900	20,283	21,572	20,500
Sri Lanka	843	843	843	1,347	1,347	1,347
Thailand	6,791	6,612	6,800	18,492	15,517	17,000
REGION TOTAL	59,721	65,437	63,104	113,103	127,399	124,297
MIDDLE EAST						
Syria	1,836	1,865	1,950	4,670	3,948	3,800
Turkey	25	55	60	70	110	110
REGION TOTAL	1,861	1,920	2,010	4,740	4,058	3,910

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 21 (Continued)

**BURLEY TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
	HECTARES			METRIC TONS		
<b>EUROPEAN COMMUNITY</b>						
France	1,330	1,139	1,500	2,856	2,584	3,300
Germany, West	1,125	1,240	1,200	2,301	3,100	3,000
Greece	3,617	3,300	3,500	10,169	9,553	9,800
Italy	13,175	13,800	14,000	40,116	38,400	42,000
Portugal	615	704	690	1,350	1,528	1,290
Spain	16,942	16,300	16,500	24,098	22,720	25,100
REGION TOTAL	36,804	36,483	37,390	80,890	77,885	84,490
<b>OTHER WEST EUROPE</b>						
Austria	264	259	256	416	457	435
Switzerland	712	699	690	1,306	1,550	1,450
REGION TOTAL	976	958	946	1,722	2,007	1,885
<b>EAST EUROPE</b>						
Bulgaria	3,721	4,000	4,500	5,200	5,700	6,000
Czechoslovakia	406	400	400	500	500	500
Germany, East	1,330	1,772	1,869	2,221	2,645	2,950
Hungary	300	250	200	543	460	380
Poland	2,065	2,495	2,650	4,510	4,460	6,800
Romania	7,300	7,100	7,000	6,800	6,400	6,600
Yugoslavia	3,000	3,000	4,000	5,000	3,000	5,000
REGION TOTAL	18,122	19,017	20,619	24,774	23,165	28,230
USSR	1,000	1,000	1,000	2,000	2,000	2,000
<b>OCEANIA</b>						
New Zealand	17	17	17	30	30	30
<b>WORLD TOTAL</b>	<b>334,587</b>	<b>359,478</b>	<b>377,997</b>	<b>584,195</b>	<b>654,761</b>	<b>720,860</b>

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 22

 ORIENTAL TOBACCO  
 AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
	HECTARES			METRIC TONS		
<b>NORTH AMERICA</b>						
Mexico	1,048	1,050	0	2,190	2,060	0
<b>SOUTH AMERICA</b>						
Chile	95	90	115	165	166	170
<b>CENTRAL AMERICA</b>						
Guatemala	84	70	104	116	64	145
Honduras	38	38	38	20	37	19
Panama	40	40	40	9	9	9
REGION TOTAL	162	148	182	145	110	173
<b>NORTH AFRICA</b>						
Libya	240	240	240	58	58	58
<b>OTHER AFRICA</b>						
Malawi	250	350	420	97	161	200
South Africa	1,400	1,129	1,015	700	615	535
Zimbabwe	150	140	40	23	22	12
REGION TOTAL	1,800	1,619	1,475	820	798	747
<b>OTHER ASIA</b>						
China	2,500	2,500	2,550	5,000	5,000	5,106
Pakistan	15,563	17,605	14,570	19,900	20,390	19,000
Philippines	156	142	150	156	142	150
Thailand	5,284	6,390	7,350	5,972	5,569	8,379
REGION TOTAL	23,503	26,637	24,620	31,028	31,101	32,635
<b>MIDDLE EAST</b>						
Cyprus	17	17	17	11	11	11
Iran	10,470	10,470	10,470	12,500	12,500	12,500
Iraq	10,000	10,000	12,000	9,000	10,000	12,000
Israel	600	800	600	370	295	350
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	10,662	10,350	10,250	7,424	7,880	8,630
Turkey	202,100	261,100	220,000	183,324	210,000	185,000
REGION TOTAL	237,599	296,487	257,087	217,629	245,686	223,491
<b>EUROPEAN COMMUNITY</b>						
Greece	87,737	82,132	86,000	132,186	120,717	133,988
Italy	14,364	13,100	12,000	19,566	16,600	15,000
REGION TOTAL	102,101	95,232	98,000	151,752	137,317	148,988
<b>EAST EUROPE</b>						
Bulgaria	76,145	75,000	76,000	108,456	86,000	105,000
Czechoslovakia	900	900	900	1,300	1,300	1,300
Romania	15,000	15,100	15,200	10,400	10,000	12,000
Yugoslavia	38,000	31,000	35,500	41,000	28,000	42,000
REGION TOTAL	130,045	122,000	127,600	161,156	125,300	160,300
<b>USSR</b>	159,000	130,000	130,000	292,000	238,000	238,000
<b>WORLD</b>	655,593	673,503	639,319	856,943	780,596	804,562

 PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
 JULY 1989

Table 23

DARK AIR AND SUN CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>NORTH AMERICA</b>						
Canada	240	445	400	510	1,005	900
United States	1,461	1,372	1,716	3,164	3,411	4,037
REGION TOTAL	1,701	1,817	2,116	3,674	4,416	4,937
<b>SOUTH AMERICA</b>						
Argentina	11,500	12,800	10,900	8,490	14,263	10,000
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	76,000	76,000	76,000	74,000	65,000	71,000
Chile	58	60	67	268	260	272
Colombia	13,372	14,630	15,176	20,468	21,940	22,655
Ecuador	325	325	325	450	450	450
Paraguay	8,792	5,170	5,170	11,364	5,833	5,833
Peru	800	800	800	800	800	800
Uruguay	70	70	70	100	100	100
REGION TOTAL	112,167	111,105	109,758	117,190	109,896	112,360
<b>CENTRAL AMERICA</b>						
Costa Rica	49	0	0	41	0	0
El Salvador	35	0	0	85	0	0
Panama	20	20	20	18	18	18
REGION TOTAL	104	20	20	144	18	18
<b>CARIBBEAN</b>						
Dominican Rep.	21,066	20,921	23,270	28,488	22,498	25,600
Haiti	100	100	100	200	200	200
REGION TOTAL	21,166	21,021	23,370	28,688	22,698	25,800
<b>NORTH AFRICA</b>						
Algeria	2,000	1,000	1,000	2,000	1,500	1,500
Libya	300	300	300	533	533	533
Morocco	107	71	95	480	387	400
Tunisia	450	500	500	1,085	1,040	1,130
REGION TOTAL	2,857	1,871	1,895	4,098	3,460	3,563
<b>OTHER AFRICA</b>						
Angola	500	500	500	500	500	500
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Congo	2,250	2,250	2,250	750	750	750
Ghana	150	0	0	155	0	0
Cote D'Ivoire	9,450	9,450	9,450	2,300	2,500	2,500
Madagascar	1,000	1,000	1,000	1,300	1,300	1,300
Malawi	4,000	2,500	2,500	909	560	820
Mozambique	400	400	400	230	230	230
Nigeria	1,731	1,731	1,731	1,566	1,910	1,910
South Africa	2,222	2,120	2,257	2,660	2,771	3,610
Zaire	450	450	450	532	532	532
REGION TOTAL	24,153	22,401	22,538	12,502	12,653	13,752

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION  
JULY 1989

Table 23 (Continued)

**DARK AIR AND SUN CURED TOBACCO (Continued)**  
**AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----			-----METRIC TONS-----			
<b>OTHER ASIA</b>						
Bangladesh	21,515	21,515	21,515	19,685	19,685	19,685
Burma	40,200	49,200	49,200	26,800	31,800	31,800
China	161,000	160,000	155,000	192,000	170,000	165,000
India	273,620	250,500	257,500	342,500	294,300	337,500
Indonesia	183,524	195,000	175,000	82,586	90,000	85,000
Cambodia	6,400	6,400	6,400	3,800	3,800	3,800
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Laos	2,850	2,850	2,850	1,975	1,975	1,975
Pakistan	2,131	2,064	1,060	6,300	5,840	3,200
Sri Lanka	1,726	1,726	1,726	1,654	1,654	1,654
Vietnam	20,000	20,000	20,000	18,200	18,200	18,200
REGION TOTAL	728,066	724,355	705,351	713,900	655,654	686,214
<b>MIDDLE EAST</b>						
Iran	4,780	4,780	4,780	7,200	7,200	7,200
Jordan	200	200	200	40	40	40
Turkey	30	30	30	18	18	18
REGION TOTAL	5,010	5,010	5,010	7,258	7,258	7,258
<b>EUROPEAN COMMUNITY</b>						
France	9,579	8,517	8,200	25,282	21,203	21,600
Germany, West	1,509	1,300	1,250	3,039	3,100	3,000
Italy	25,257	35,900	34,500	50,469	78,600	69,000
Spain	180	0	0	361	0	0
REGION TOTAL	36,525	45,717	43,950	79,151	102,903	93,600
<b>EAST EUROPE</b>						
Albania	24,000	24,000	24,000	16,000	15,000	15,000
Czechoslovakia	1,350	1,350	1,350	2,500	2,500	2,500
Germany, East	760	730	666	1,155	1,362	1,220
Hungary	4,120	4,150	3,800	10,560	11,050	10,390
Poland	21,238	17,019	18,000	51,890	37,455	26,900
Romania	5,350	5,300	5,100	5,900	5,500	5,700
REGION TOTAL	56,818	52,549	52,916	88,005	72,867	61,710
<b>WORLD</b>	<b>988,567</b>	<b>985,866</b>	<b>966,924</b>	<b>1,054,610</b>	<b>991,823</b>	<b>1,009,212</b>

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION  
 JULY 1989

Table 24  
LIGHT AIR CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>NORTH AMERICA</b>						
Mexico	8,715	10,303	7,585	6,650	16,570	12,740
United States	6,354	5,463	5,059	9,407	8,789	8,256
REGION TOTAL	15,069	15,766	12,644	16,057	25,359	20,996
<b>SOUTH AMERICA</b>						
Argentina	1,000	713	627	962	983	1,050
Brazil	8,000	8,000	8,000	12,000	14,000	13,000
Colombia	936	724	704	1,100	1,065	1,016
Paraguay	60	50	50	54	45	45
Peru	100	100	100	100	100	100
REGION TOTAL	10,096	9,587	9,481	14,216	16,193	15,211
<b>CENTRAL AMERICA</b>						
Costa Rica	436	416	421	819	861	791
Guatemala	235	220	168	424	198	244
Honduras	78	216	108	82	281	158
Nicaragua	140	140	140	300	300	300
REGION TOTAL	889	992	837	1,625	1,640	1,493
<b>NORTH AFRICA</b>						
Algeria	4,000	3,000	3,000	4,000	4,000	4,000
Libya	60	60	60	144	144	144
Morocco	30	36	45	71	86	85
REGION TOTAL	4,090	3,096	3,105	4,215	4,230	4,229
<b>OTHER AFRICA</b>						
Cameroon	810	810	810	600	600	600
Congo	1,850	1,850	1,850	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Mauritius	50	33	50	49	53	50
Nigeria	4,533	4,533	4,533	3,948	4,210	4,210
South Africa	798	378	630	810	666	1,080
Zaire	370	370	370	532	532	532
REGION TOTAL	10,411	9,974	10,243	8,444	8,566	8,977
<b>OTHER ASIA</b>						
Bangladesh	6,135	6,135	6,135	6,580	6,580	6,580
India	2,800	2,725	6,500	3,100	3,600	10,500
Japan	9,572	3,445	2,013	21,205	9,600	5,100
Korea	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	8,765	9,856	8,100	16,500	18,100	15,000
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
REGION TOTAL	37,551	32,440	33,027	57,675	48,170	47,470
<b>MIDDLE EAST</b>						
Syria	492	325	350	423	216	420
<b>EUROPEAN COMMUNITY</b>						
Italy	1,850	1,900	2,000	2,956	3,400	3,500
<b>WORLD</b>	80,448	74,080	71,687	105,611	107,774	102,296

PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
JULY 1989

Table 25

**DARK AIR CURED TOBACCO, CIGAR  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>NORTH AMERICA</b>						
Canada	150	140	130	260	250	225
Mexico	3,844	3,860	3,623	7,810	7,400	7,750
United States	5,492	4,836	5,107	11,390	10,227	10,614
REGION TOTAL	9,486	8,836	8,860	19,460	17,877	18,589
<b>SOUTH AMERICA</b>						
Brazil	6,000	6,000	6,000	9,000	5,000	9,000
Colombia	667	605	472	810	894	663
Ecuador	125	125	125	125	125	125
REGION TOTAL	6,792	6,730	6,597	9,935	6,019	9,788
<b>CENTRAL AMERICA</b>						
Costa Rica	0	17	40	0	52	22
Honduras	436	584	516	587	1,160	1,270
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
REGION TOTAL	1,066	1,231	1,186	1,632	2,257	2,337
<b>CARIBBEAN</b>						
Cuba	49,500	49,500	49,500	37,000	38,000	38,000
Jamaica & Dep	628	628	628	1,127	1,127	1,127
REGION TOTAL	50,128	50,128	50,128	38,127	39,127	39,127
<b>OTHER AFRICA</b>						
Cameroon	1,490	1,490	1,490	1,880	1,800	1,800
<b>OTHER ASIA</b>						
Bangladesh	14,000	14,000	14,000	12,000	12,000	12,000
China (Mainland)	31,000	32,000	32,000	71,000	73,000	73,000
Indonesia	9,909	10,000	10,000	13,024	14,000	13,500
Philippines	12,190	16,000	16,000	16,178	18,000	18,500
Thailand	21,500	19,000	18,000	11,800	10,450	9,000
REGION TOTAL	88,599	91,000	90,000	124,002	127,450	126,000
<b>EUROPEAN COMMUNITY</b>						
Belgium/Luxembou	384	426	425	1,079	1,586	1,582
Spain	562	600	500	909	665	1,045
REGION TOTAL	946	1,026	925	1,988	2,251	2,627
<b>EAST EUROPE</b>						
Poland	320	293	350	670	550	600
<b>WORLD</b>	<b>158,827</b>	<b>160,734</b>	<b>159,536</b>	<b>197,694</b>	<b>197,331</b>	<b>200,868</b>

PREPARED BY: FOREIGN PRODUCTON ESTIMATES DIVISION, FAS/USDA  
JULY 1989

Table 26

**DARK FIRE CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS**

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1987	1988	1989 (FORECAST)	1987	1988	1989 (FORECAST)
-----HECTARES-----				-----METRIC TONS-----		
<b>NORTH AMERICA</b>						
Mexico	1,467	1,470	1,240	1,790	1,500	1,600
United States	5,609	5,480	6,568	12,508	13,945	14,969
REGION TOTAL	7,076	6,950	7,808	14,298	15,445	16,569
<b>SOUTH AMERICA</b>						
Argentina	100	120	50	116	141	50
<b>OTHER AFRICA</b>						
Ghana	100	0	0	106	0	0
Kenya	1,000	1,000	1,000	1,657	1,950	2,300
Liberia	10	10	10	10	10	10
Malawi	39,000	29,000	29,000	13,500	7,987	7,500
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	215	215	215
Tanzania	6,200	2,832	2,832	2,300	2,000	2,000
Uganda	2,700	2,700	2,700	700	700	700
Zaire	1,350	1,350	1,350	986	986	986
REGION TOTAL	50,638	37,170	37,170	19,644	14,018	13,881
<b>EUROPEAN COMMUNITY</b>						
Italy	4,309	4,000	4,000	8,217	7,500	7,500
<b>EAST EUROPE</b>						
Poland	5,728	4,956	4,700	18,360	15,170	13,000
<b>WORLD</b>	<b>67,851</b>	<b>53,196</b>	<b>53,728</b>	<b>60,635</b>	<b>52,274</b>	<b>51,000</b>

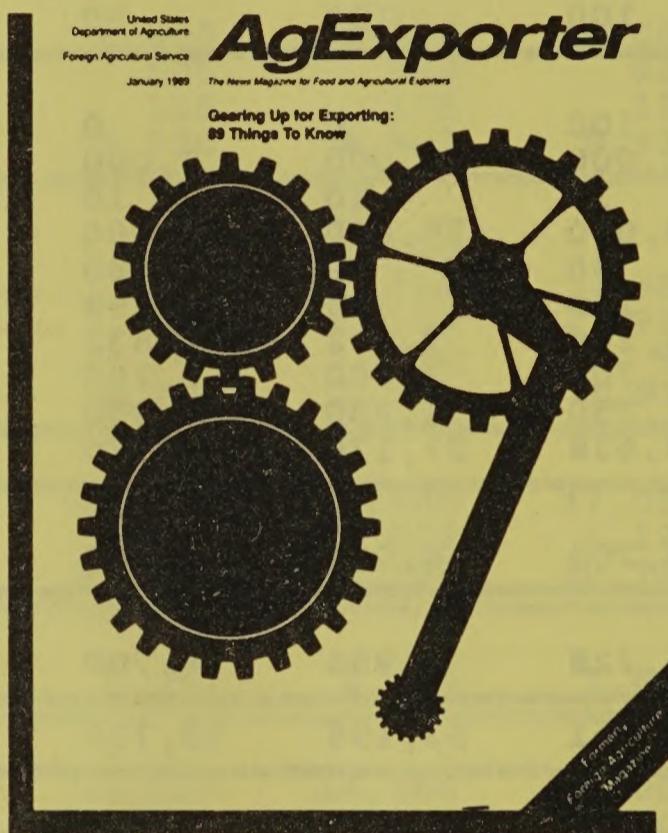
PREPARED BY: FOREIGN PRODUCTION ESTIMATES DIVISION, FAS/USDA  
JULY 1989

**Do you need  
information  
about...**

- Overseas markets and buying trends?
- New competitors and products?
- Overseas promotional activities?

Then **AgExporter**— USDA's fact-filled monthly agricultural trade magazine—is for you. Based on official USDA data available nowhere else, **AgExporter** articles are clear and crisp, written to provide the export information you need, in a concise and extremely readable form.

Special information is found in **AgExporter's** telegraphed, targeted news departments: Fact File, Country Briefs and Marketing News. And its tables and graphs give an immediate grasp of what's going on overseas.



In addition, periodic special issues—such as the one devoted entirely to the 10 steps to marketing success—give you a wide range of detailed information about overseas markets.

If you use agricultural facts and figures in your business, you need **AgExporter**.

**Subscribe today!**

## Subscription Order Form

---

**Check One:**

- Enter my 12-month subscription. Enclosed is my check for \$11.00 (\$14.00 for foreign delivery).
- At such a low subscription rate, I'd like to lock it in for 2 years. Enclosed is my check for \$22.00 (\$28.00 foreign delivery).
- Better yet, let's make it 3 years. Enclosed is my check for \$33.00 (\$42.00 for foreign delivery).

Send a check for the total amount payable to the Foreign Agricultural Service. Only checks on U.S. banks, cashier's checks, or money orders will be accepted. **No refunds can be made.**

*Mail this to:*

**Foreign Agricultural Service  
Room 4642-S  
U.S. Department of Agriculture  
Washington, D.C. 20250-1000**

Washington, D.C.

Name (last, first, middle initial)

Name (last, first, middle initial):

### Organization of Firm

Organization of Firm

Street or P.O. Box Number

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46 47 48 49 50 51 52 53 54 55 56 57 58 59 60 61 62 63 64 65 66 67 68 69 70 71 72 73 74 75 76 77 78 79 80 81 82 83 84 85 86 87 88 89 90 91 92 93 94 95 96 97 98 99 100

## City

11. *Leucosia* (Leucosia) *leucostoma* (Fabricius) (Fig. 11)

## Country

## State

**Zip Code**

# FAS Circulars: Market Information For Agricultural Exporters

As an agricultural exporter, you need timely, reliable information on changing consumer preferences, needs of foreign buyers, and the supply and demand situation in countries around the world.

The Foreign Agricultural Service can provide that information in its commodity circulars.

World agricultural information and updates on special FAS export services for the food and agricultural trade all are available in these periodic circulars.

For a sample copy of these reports—which can supply you with the information you need to make sound business decisions—check the box indicated, fill out the address form, and mail it today.

To subscribe: Indicate which publications you want. Send a check for the total amount payable to the Foreign Agricultural Service. Only checks on U.S. banks, cashier's checks, or international money orders will be accepted. NO REFUNDS CAN BE MADE.

Mail this form to: Foreign Agricultural Service  
Information Division  
Room 4844-S  
U.S. Department of Agriculture  
Washington, D.C. 20250-1000

<u>No. of Subscriptions</u>	<u>Subscription Rate</u>
10022. World Cocoa Situation (2 issues)	Domestic \$ 5.00 Foreign \$ 7.00
10003. World Coffee Situation (3 issues)	7.00 12.00
10004. World Cotton Situation (12 issues)	24.00 35.00
 Dairy, Livestock & Poultry:	
10005. Dairy, Livestock & Poultry: Export Trade & Prospects (12 issues)	28.00 56.00
10006. Meat & Dairy Monthly Imports (12 issues)	22.00 28.00
10007. World Dairy Situation (1 issue)	4.00 6.00
10008. World Livestock & Poultry Situation (1 issue)	5.00 7.00
10009. All 26 Dairy, Livestock & Poultry Reports	57.00 97.00
 Grain:	
10010. World Grain Situation & Outlook (12 issues)	24.00 35.00
10011. Export Markets for U.S. Grain & Products (12 issues)	24.00 35.00
10013. USSR Grain Situation & Outlook (8 issues)	12.00 18.00
10014. All 32 Grain Reports	60.00 88.00
10015. Horticultural Products Review (12 issues)	24.00 35.00
10016. World Oilseed Situation & Market Highlights (12 issues)	28.00 56.00
10017. U.S. Seed Exports (4 issues)	12.00 20.00
10018. World Sugar and Molasses Situation & Outlook; World Honey Situation (3 issues)	7.00 10.00
10019. World Tea Situation; U.S. Spice Trade; U.S. Essential Oil Trade (3 issues)	7.00 12.00
10020. World Tobacco Situation (12 issues)	26.00 45.00
10021. World Agricultural Production (12 issues)	24.00 35.00
10023. Wood Products: International Trade and Foreign Markets (4 issues)	10.00 15.00
 Total Reports Ordered	 Total Subscription Price _____

Please send me a sample copy.

Enclosed is my Check for \$ \_\_\_\_\_ Made Payable to Foreign Agricultural Service.

Name (Last, first, middle initial)

Organization or Firm

Street or P.O. Box Number

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Country \_\_\_\_\_ Phone No. ( ) \_\_\_\_\_ - \_\_\_\_\_

UNITED STATES DEPARTMENT OF AGRICULTURE

Foreign Agricultural Service  
Room 4644-S  
WASHINGTON, D.C. 20250-1000

FIRST-CLASS MAIL  
POSTAGE & FEES PAID  
USDA-FAS  
WASHINGTON, D.C.  
PERMIT No. G-262

OFFICIAL BUSINESS  
PENALTY FOR PRIVATE USE, \$300

If your address should be changed \_\_\_\_\_ PRINT  
OR TYPE the new address, including ZIP CODE and  
return the whole sheet and/or envelope to:

FOREIGN AGRICULTURAL SERVICE, Room 4644 So.  
U.S. Department of Agriculture  
Washington, D. C. 20250.

HOW TO SUBSCRIBE

"World Agricultural Production" circulars are issued 12 times per year.  
They are available on a subscription basis for \$24 in the United States or  
\$35 for foreign addresses.

To subscribe, send your check, payable to the Foreign Agricultural Service,  
to: Information Division, FAS, USDA, Room 4644-South Building, Washington,  
D.C. 20250-1000. Only checks drawn on U.S. banks, cashier's checks, or  
international money orders will be accepted. NO REFUNDS CAN BE MADE.

HOW TO RENEW

You will receive notification about 60 days before your annual subscription  
expires. To prevent a lapse in service, promptly return your renewal form  
and payment. Inquiries: If you have a question about your subscription,  
write to the above address or call (202) 382-9445.

HOW TO OBTAIN DATABASE TAPES

Agricultural production, supply and distribution database tapes are  
available on a one-time or subscription basis from the National Technical  
Information Service of the U.S. Department of Commerce. The tapes are  
updated quarterly and contain data for many commodities and countries from  
1960 to the present. Each tape costs \$203 for domestic and \$404 for  
foreign orders, including airmail, handling and shipping charges. Use  
order number PB 88-149570 and specify the recording density desired. Write  
to NTIS, 5285 Port Royal Road, Springfield, Virginia 22161, or call (703)  
487-4650 to obtain the most current tape or (703) 487-4763 for a  
subscription.